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Self-Help Service Center Management System User's Manual: Version 2.5

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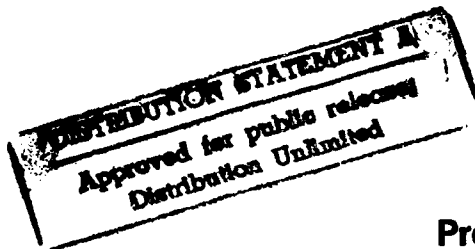
Prepared By

Resource Center Enterprises, Inc.
Urbana, Illinois

in cooperation with

U. S. Army Construction Engineering Research Laboratories
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Kurt Larson and Jeffrey G. Kirby

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U.S. Army Construction Engineering Research Laboratories (USACERL)
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Champaign, IL 61826-9005

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13. ABSTRACT (Maximum 200 words)

The Self-Help Service Center (SHSC) Management System, Version 2.5, is a menu-driven, IBM AT-compatible inventory system designed to help personnel in Army installation SHCSs monitor inventory transactions and inventory levels, and keep information on customers, suppliers, housing units, and equipment repair. This system records cost by individual family housing unit, and also generates reports on equipment issues, overdue loans, usage history, and reorder requirements.

This user's manual includes step-by-step instructions for the installation and use of the SHSC Management System, and menu illustrations for all important program functions.

Version 2.5 of this program can be used in either a multi-user network or a single-user environment. This manual supercedes FEAP-ADP-P-91/38 of June 1991.

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FOREWORD

Several versions of the Self-Help Service Center Management System have been produced and distributed over the past five years. The program represents the efforts of numerous individuals and organizations, including a large number of users at Self-Help stores throughout the Army.

Early program funding was provided by the U.S. Army Center for Public Works (CECEPW) under the Facilities Engineering Application Program (FEAP), Project F00, "Automation of Self-Help Programs." The technical monitor was Mr. Chuck Racine, CECPW-ES.

Initial program development was conducted by the U.S. Army Construction Engineering Research Laboratories (USACERL), Facility Systems Division (FS). Mr. Jeffrey G. Kirby was the principal investigator. Mr. Michael J. Fuerst and Mr. Yoon-Ho Lim programmed the first Self-Help system software.

In the past three years, Resource Center Enterprises has worked in conjunction with USACERL to distribute the Self-Help program and to provide support for users. The program has been updated to meet requests by users and to improve performance. This manual documents the latest version (2.5) that is currently being distributed and replaces USACERL ADP P-91/38, *Self-Help Service Center Management System User's Manual: Version 2.1*. Mr. Kurt Larson is now the principal programmer for the package. Mr. Kirby serves as technical monitor for current contract efforts. Funding for this project is now provided by customers.

The Self-Help Service Center Management System (SHSCMS) is not public domain software. If your organization desires to permit a contractor to use this software to perform a contract, your contracting officer needs to identify this software package as government furnished equipment and require that it be returned entirely with no residual rights to the contractor.

Accession For	
NTIS GRA&I	☑
DTIC TAB	☐
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SELF-HELP SERVICE CENTER MANAGEMENT SYSTEM
USER'S MANUAL

1 INTRODUCTION

1.1 Background

The Self-Help Service Center (SHSC) Management System is a computerized inventory system designed to help personnel in Army installation SHCSs automate inventory transactions, monitor inventory levels, and create reports. Version 2.5 can be used in a multi-user network, as well as in a single-user environment. The system runs on IBM AT-compatible equipment and requires minimal training, since it uses a series of menus and prompts. The SHSC Management System helps to:

1. Automate service-desk operations

2. Keep information on:

   a. Inventory   d. Housing units
   b. Customers   e. Equipment repair
   c. Suppliers

3. Print reports on:

   a. Equipment issues   c. Usage history
   b. Overdue loans   d. Reorder requirements

4. Print inventory-check sheets.

1.2 Mode of Technology Transfer

The Self-Help program was initially developed by programs at the U.S. Army Construction Engineering Research Laboratories (USACERL) in Champaign, Illinois. The latest versions were developed by Resource Center Enterprises, Inc. (RCE) under contract to USACERL. Interested parties can find out how to obtain the Self-Help Service Center Management System software by contacting RCE, 1408 W. University Ave., Urbana, IL 61801 (toll-free 1-800-428-4357). Telephone assistance is available to support subscribers at: (toll-free) 1-800-428-HELP. If desired, reimbursable on-site visits may be arranged by calling the toll-free HELP number.

2 INSTALLATION

This chapter gives instructions for installing the SHSC Management System for the first time.

2.1 Hardware Requirements

Single-user applications of the SHSC Management System require the following hardware:

1. IBM-AT class (80286) computer or above
2. 20-meg hard disk (40-60 meg strongly suggested)
3. Color or monochrome monitor
4. 512K free memory (assuming no memory-resident programs beyond DOS)
5. IBM or Epson-compatible dot-matrix printer
6. MS-DOS 3.3 or PC-DOS 3.3 or higher (VERY IMPORTANT)
7. Optional Equipment:

    a. Barcode wand interfaced with the computer keyboard
    b. Preprinted barcode labels
    c. LaserJet-compatible laser printer (instead of dot-matrix printer).

Multi-user applications require:

1. A 80286 or 80386 computer as the server. Depending upon performance and the network operating system used, the server may be used as a work station.

2. A 80286 or above computer or diskless work station for each user, each of which has:

    a. 470K RAM free after loading the network operating system
    b. A color or monochrome monitor
    c. An optional barcode wand interfaced with the computer keyboard
    d. Either an IBM- or Epson-compatible dot-matrix or LaserJet-compatible printer (may be shared).

NOTE: 80386 or 80486 recommended.

Call the program distributor for the latest recommendations for multi-user configurations and operating systems.

2.2   Installing System Files on Hard Disk

The installation program offers two modes of installing the current version of Self-Help to the hard disk. One is to update a previously installed version of the software. The other is to install the Self-Help program for the first time. The program is delivered on four (4) 5 1/4" low density floppy disks or one high density disk. To implement either of the above options, insert the floppy labeled disk #1 into the corresponding A or B floppy drives. After the drive door is latched, log onto the floppy drive by typing A: or B: from the DOS prompt (C:>). Next type install and press the key labeled [Enter]. An example is shown below to install from the A:> drive. To install from B:>, log on to the B:> drive.

Example: A:>install

Note: Be sure there is at least 470k available as the largest executable program size on your system before running the install. If there is less than this amount, an out of memory message may occur. Enter "menu" at C:> prompt to see how much memory is available.

The install program will open with a menu which has two possible selections. To upgrade a currently running version of Self-Help to the latest version, press selection #1. To install Self-Help for the first time, press selection #2. To abort the program, press [PgDn].

Upgrading a Currently Running Version of Self-Help to the Latest Version

After selecting the upgrade option from the install menu, a prompt will appear which will ask what directory the Self-Help files are located. It will default to C:\Selfhelp. If the files are in a different location, type the directory in the field. Be sure to include a different drive letter if the files are located on a different drive. Once the directory has been chosen, the install program will search to be sure it can find the Self-Help files. If the search fails, the operator will be notified that it failed and given another chance to type in the location. The upgrade will not execute until the files can be located by the install program. If there are no Self-Help files on the system, selection #2 (install Self-Help for the first time) must be selected.

Once the files have been located, the upgrade process will begin. The process is automated. Messages will appear to inform program progress. Depending on the diskettes in use, the operator will be prompted to insert additional disks.

After all files have been copied, database upgrading will begin. This process is comprehensive. It will check the database structures to see if they need to be adjusted. If the version to be upgraded is at least v2.1, all changes will be covered. Any database that does not need to be adjusted will be skipped. This process could take a large amount of time depending on the size of the databases and the changes which are made to them.

Be sure to back up all data before attempting an update of currently operating data.

Installing Self-Help for the First Time

To install Self-Help files on the hard disk for the first time, choose selection #2. A prompt will appear asking to which directory to copy the Self-Help files. The default is C:\Selfhelp. To install the files to this directory, press [Enter]. Type the drive and directory name to install Self-Help in a different directory. If the directory does not exist, the program will create it. The process will copy all files to this directory, prompting when to insert a new disk along the way. Below is a list of the executable files which are copied to the hard disk.

selfhelp.exe   The SHSC Management System program described in the user's manual. This uses several .ovl files, which are also automatically installed.

reindex.exe   This re-indexes all files in the database. This program is used only if index files get corrupted because of a program or computer failure.

cerl_zap.exe   This deletes all the data from the system databases. You may wish to delete this from the hard disk.

Purge.exe   A purging utility to delete old data from the consumables and facility consumables databases.

Addpass.exe   A password utility to create a supervisor password when the passwords are lost or modified. This program should be copied to a floppy, then erased from the directory. The floppy should be secured.

2.3   Modifying System Configuration Files

When your computer first starts, it configures the Disk Operating System (DOS) to allow a number of files to be open at the same time. Using the SHSC Management System program requires a file in the root directory of your hard disk, called config.sys, that tells DOS how many files and file buffers to use. This file must contain the lines:

	Without Network	With Network
Files	files=50	files=99
Buffers	buffers=20	buffers=20

When running Self-Help in some network environments, such as Novell's Netware, additional files must be created to insure proper file handling by the operating system. Two files should be created in the same directory which hold the IPX driver files: NET.cfg and SHELL.cfg. Both files should include the same statement: "filehandles=99".

3   GETTING STARTED

Having installed the SHSC Management System, you are now ready to begin your first session on the system. This section will discuss how to start and quit the system, how to enter the system and issue passwords to operators, how to move between the menus and enter information to build up your database files, and how to search for customer records and inventory items.

In several places throughout this manual appear instructions to press the **Enter** key. On some keyboards, this key is labeled "Enter," on others "Return," and on others it is labeled with a returning arrow heading down and to the left. Throughout this manual, this key will be referred to as **Enter**.

3.1   Starting the SHSC Management System

To enter the SHSC Management System, while in the SELFHELP directory, at the DOS prompt, type (upper or lower case): selfhelp

Figure 3-1 shows the screen that appears:

```
┌─────────────────────────────────────────────┐
│                                              │
│                                              │
│     ┌──────────────────────────────────┐     │
│     │ Self-Help Service Center Management System │
│     │                                  │     │
│     │        Password: ▓▓▓▓▓▓▓▓▓▓▓▓     │     │
│     └──────────────────────────────────┘     │
│                                              │
│                                              │
│                                 Version 2.5  │
└─────────────────────────────────────────────┘
```
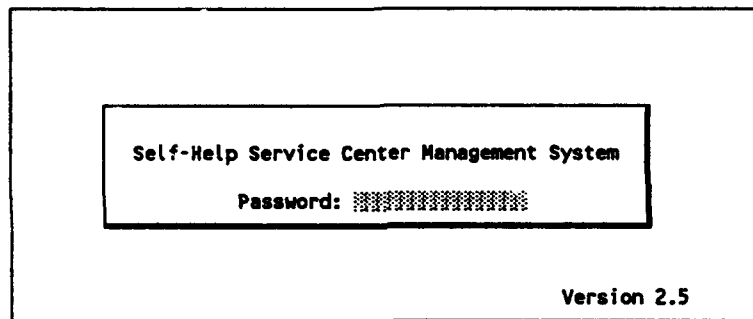
Figure 3-1. Self-Help Introductory Screen.

3.2   Passwords and Security

A valid password must be given to enter the SHSC Management System. If your system is new and no data has been entered into data files, simply press **Enter.** No passwords need be established to use the program. Section 4.9 discusses how to assign passwords to limit individuals' access to certain functions in the program.

If passwords have been established, the system allows three attempts at entering a password and then returns to DOS. From DOS prompt, you can start over by typing SELFHELP again. Otherwise, type your password and then press **Enter.** The MAIN MENU (Figure 3-2) will then appear.

3.3 The Main Menu

```
          Self-Help Service Center Management System¦

                    ┌─────────────────────────┐
                    │      MAIN  MENU         │
                    └─────────────────────────┘
                    Issue/Return
                    Equipment Repair
                    Reorder/Receive Inventory
                    Suppliers
                    Inventory and Store Hours
                    Accounts/Customers
                    Facility Descriptions
                    Reports
                    Password Functions
                    System Settings
                    Quit System to DOS

Use Arrow Keys  to make Selection.
Then press ENTER.
```
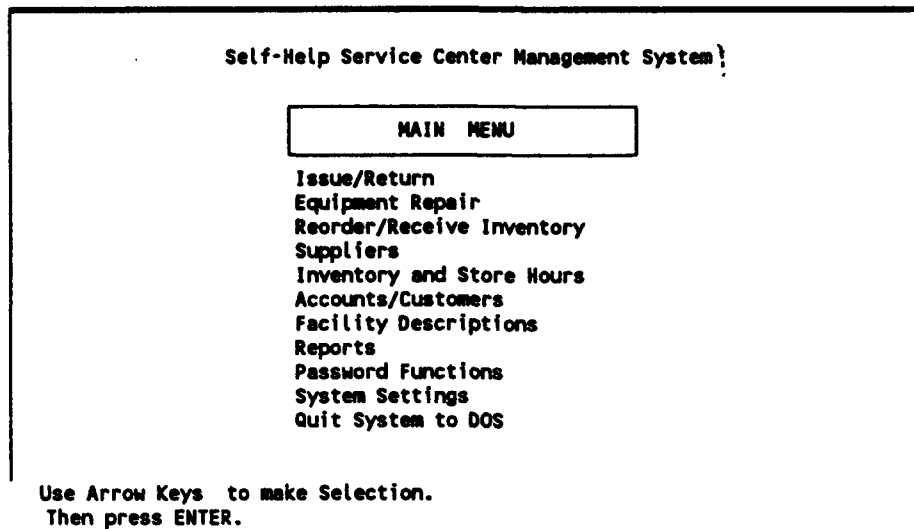
Figure 3-2. SHSC Management System MAIN MENU.

The MAIN MENU selects the appropriate part of the program to handle issues or returns, determine reordering requirements, update the databases, and create reports.

Chapters 4 through 13 explain the detailed operations of each MAIN MENU selection and are ordered as in the MAIN MENU. However, after reading this chapter, Chapter 8 (inventory) and Chapter 9 (accounts) are most important for store operation.

Throughout the SHSC Management System, the two lines on the bottom of the screen lines contain help and error messages. In most cases, they will answer any questions concerning what to do next.

3.4 Introduction to Operations

3.4.1 Description of Data Saved by the SHSC Management System

The SHSC Management System maintains information about inventory items, accounts, customers authorized to receive material under each account, and suppliers and facilities associated with the accounts. The program maintains records of account and customer transaction histories and items under repair.

To begin recording transaction histories, only basic data items describing accounts, customers, and inventory items must be set up. The remaining data items for accounts, customers, and inventory, and the descriptions of suppliers and housing units need not be entered into the SHSC Management System before transactions can be entered. For example, entering a customer's name and ID number is required, but entering a customer's phone number, although not required,

provides information for follow-up calls to a customer who has overdue items. Although for each inventory item, the system requires only the catalog (identifying) number and classification as consumable or nonconsumable, also entering an item's warehouse location (row and bin) can assist clerks in locating items for customers. The SHSC program can also determine inventory items requiring reordering if reorder quantities and levels are specified. Providing such information allows monitoring of additional aspects of the program's operation. The sections of this manual dealing with data entry identify which data items are required and which are optional.

The program design intentionally allows latitude in assigning codes for accounts, customers, and inventory identifying codes, making the program responsive to local needs. However, certain conventions should be established and followed.

3.4.1.1   Account Data

Inventory items are issued to an account. An account may be a family housing unit, a troop barracks unit, a work group within an administrative building, or any other appropriate unit. Each account has one or more customers authorized to receive material under that account. For instance, a family housing unit might have the two residents authorized, while a barracks may have one to three authorized enlisted personnel. Each account has an alphanumeric identifying code or ID, which is different from all other account IDs. Each custor .r has a unique customer ID, different from all other customer IDs. Customer IDs must be unique because a customer can be listed in multiple accounts at many sites.

Account IDs may be housing or facility unit number, truncated or abbreviated street address, or even the ID of an authorized customer—whichever is convenient.

3.4.1.2   Inventory Data

The program maintains information about inventory items, including catalog number, type, category, description, and information about stock level, the need to reorder, and availability. A complete description of the data to be entered is found in Chapter 8, "Edit Inventory."

Inventory items are designated as either consumable or nonconsumable. Consumable items are those that will not be returned for reuse, such as paint, faucet washers, and toilet seats. Nonconsumable inventory items include tools and other equipment loaned to customers. Temporary nonconsumable items, such as lawn mowers, must be returned by a certain due date and time. Permanent nonconsumable inventory items, such as rakes and snow shovels used by family housing units, remain with a customer until the customer vacates the facility.

Some inventory items should be designated as direct exchange items, which means they should be issued only in exchange for the items they replaced. Direct exchange inventory items are so marked when the inventory item is entered into the system. For example, a new window shade might be issued only if the old, broken one is returned.

Inventory items may be grouped into categories, e.g., paint, plumbing supplies, or electrical.

The number of consumable inventory items that may be issued to an individual between two dates can be monitored for each item. For example, each customer could be limited to 20 leaf bags during the months of October and November.

The program can report that the supply of an inventory item has fallen below a specified threshold level, and may include a user-specified quantity to reorder. The program also allows defining up to two seasonal thresholds and reorder levels, along with the dates that these seasonal exceptions are in effect.

3.4.1.3 Supplier Data

Information maintained about suppliers includes supplier ID, name, address, and phone. The information in this file is covered in Chapter 7.

3.4.1.4 Facility Description Data

The system can maintain facility information, including facility number, type, category, and a description of furnishings and appliances. This file is discussed in more detail in Chapter 10, "Edit Facility Description."

3.4.1.5 Password Data

This information controls access to the system. See Chapter 12 for details.

3.4.1.6 Usage Data

The program also maintains a history of what items have been issued to which customers.

3.4.2 Issues and Returns

The *Issues/Return* operation, the MAIN MENU selection most often used, is for issuing and returning inventory items and equipment to and from customers, keeping track of inventory levels, and printing out reports on customer transactions. Chapter 5 contains a step-by-step description of how to use the *Issue/Return* operation.

3.4.3 Printing Reports

The system can generate reports on outstanding and overdue loans, consumable usage history, items to order, items on order, and inventory check sheets. Chapter 11 includes detailed descriptions of all available reports.

3.5 Menus and Screens

The SHSC Management System uses a combination of menus and data entry screens to guide operators. The last two lines of the display provide operator assistance. IF YOU DO NOT KNOW WHAT TO DO NEXT, OR THE PROGRAM BEEPS TO INDICATE AN ERROR, REFER TO THE LAST TWO LINES OF THE DISPLAY.

3.5.1 Menus

The SHSC Management System uses menu screens, such as the MAIN MENU, to allow the operator to move between different parts of the system. When a menu appears, one of the options on the menu will appear highlighted. To select an option other than the one highlighted, use the up and down arrow keys to highlight the desired option. Press **Enter** once the desired option is highlighted. For example, if in the MAIN MENU, the *Issue/Return* selection is highlighted, press **Enter** to select the *Issue/Return* option. To edit inventory items, press the **down** arrow key four times and then press **Enter**. In this latter case, another menu appears, with the options to *Edit*, *Add*, or *Delete* an inventory item, or to change the catalog number of an item. Table 3-1 lists the keys used to move inside and between menus.

Table 3-1

Keys Used for Menus

Key	Function
F2	Return to Previous Menu
Esc	Return to Previous Menu
Up arrow	Move menu highlighter up
Down arrow	Move menu highlighter down
Home	Move to first option in menu
End	Move to last option in menu
Letter	Move to and select first option from top of menu starting with that letter
Enter	Make menu selection

3.5.2 Screens for Data Entry and Editing

The SHSC Management System uses data screens for entering or revising data. The current field is always highlighted (represented in this manual by ░░░░░░░░░░). While on a data screen, the F2 key aborts the operation and discards all data entered or revised. The F10 key saves the information entered or revised and performs the requested operation. If the F2 key is pressed,

3-5

the operator is returned to the last screen or menu. Table 3-2 lists the editing functions associated with particular keys.

3.6 Selecting Customer Accounts and Inventory Items

Often the program requires the identification of a customer or inventory item.

3.6.1 Account/Customer Selection

For issuing or returning inventory items, and for some reporting functions, such as generating a report of a customer's overdue loans, the program requires identification of an account, customer, or account-customer combination. When such information is required, the screen displays input fields for account/customer ID, last name, first name, and often a facility ID. Figure 3-3 shows a typical screen indicating a customer and account for issuing or receiving returned items.

Table 3-2

Keys Used For Data Entry and Editing

Key	Function
Backspace	Erase the character to the left of the cursor and move the cursor left one space.
Ins	Insert characters in data. Pressing this key toggles the insert mode. Press the Ins key once to turn on the insert mode, and press the Ins key again to turn off the insert mode.
Del	Delete one character
Up arrow	Move to the previous data entry field
Down arrow	Move to the next data entry field
Return	Move to the next data entry field
Home	Move to first space in data entry field
End	Move to end of data entry field
F2	Abort operation, do not save data
F10	Complete operation, save data

```
┌─────────────────────────────────────────────────────────────────────┐
│    Close Transaction      List Overdues    List Outstanding   List Unit │
├─────────────────────────────────────────────────────────────────────┤
│  Acct/Cust ID : ▓▓▓▓▓▓▓▓▓▓           Today's Date : 03/09/90          │
│     Last Name :                                                       │
│    First Name :                                                       │
│    Facility ID :                                                      │
│                                                                       │
│                                                                       │
│                                                                       │
│                                                                       │
│                                                                       │
│                                                                       │
│                                                                       │
│                                                                       │
│                                                                       │
│                                                                       │
│                                                                       │
├─────────────────────────────────────────────────────────────────────┤
│  Enter Account or Customer ID, or press ENTER to go to name field.    │
│  F2-Issue/Return Menu                    Current-Issue/Return Mode     │
└─────────────────────────────────────────────────────────────────────┘
```

Figure 3-3. Screen Display of Input Fields for Account/Customer ID.

Use one of the following methods to identify the customer or account:

1.   Type the ID number of the account or customer and press **Enter**.

2.   Press **Enter** to bypass the account/customer ID, and type the customer's last name, in full or in part, followed by **Enter**. Press **Enter** again to leave the customer's first name blank. The system will then find the first customer whose last name begins with the characters entered. Press the **PgDn** key to scroll through any other such customers.

3.   Press **Enter** to bypass the customer ID, and type the last and then the first name of the customer.

4.   If below the First Name field, a field for facility number appears on the screen. As with the above screen, you may press **Enter** three times to bypass the customer ID, last name, and first name, and type the facility number.

From information entered in any one of these four choices, the program will either:

1.   Identify a unique account and/or customer;

2.   Display a list for choosing an authorized customer for the indicated account, or an account for the indicated customer; (or)

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3.   If a facility was entered, and multiple accounts are assigned to the facility, first display a list for choosing the correct account.

For example, if you had entered 084423087 as the account number, and this account had two assigned customers, a window like that shown in Figure 3-4 might appear:

```
┌─────────────────────────────────────────────────────────────────────┐
│  Close Transaction      List Overdues    List Outstanding    List Unit │
├─────────────────────────────────────────────────────────────────────┤
│ Acct/Cust ID :  084423087                       Today's Date : 03/09/90 │
│    Last Name :                                                          │
│   First Name :                                                          │
│   Facility ID    ┌──────────────────────────────────────────────┐      │
│                  │ SELECT CUSTOMER FOR ACCOUNT 084423087          │      │
│                  │    CUST ID     LAST NAME       FIRST NAME      │      │
│                  │                                                │      │
│                  │    084423087   DODGSON         CHARLES    J    │      │
│                  │    293484758   DODGSON         ALICE           │      │
│                  └──────────────────────────────────────────────┘      │
│                                                                         │
│                                                                         │
│                                                                         │
│                                                                         │
│                                                                         │
│                                                                         │
├─────────────────────────────────────────────────────────────────────┤
│  ↑, ↓, PgUp, PgDn to scroll,   ENTER to select, ESC to cancel          │
│  F2-Issue/Return Menu                    Current-Issue/Return Mode      │
└─────────────────────────────────────────────────────────────────────┘
```

Figure 3-4. Customer Selection Screen.

Then scroll through the list, and press the **Enter** key to select the highlighted customer.

If the customer has been locked out for any administrative reasons, a box will appear showing that this is the case. The user will be asked to choose whether or not to continue. If the operator wishes to continue, the transaction will proceed in the normal fashion. If the operator selects no, the program returns to the issue/return menu. The purpose and procedures to set up lock-out codes will be discussed in Chapter 16.

3.6.2 Inventory Item Selection

Two ways also exist to select an inventory item, either:

1.   Enter the catalog number of the item, or

2.   Enter the category name to which the item belongs, and then use the **PgDn** key to search forward or **PgUp** to search backwards through the list for the desired item.
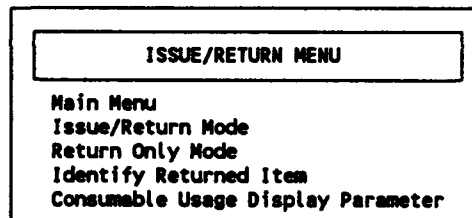
4   ISSUES AND RETURNS

Operators will frequently use one of the following *Issue/Return* capabilities of the program:

1.   A general issue/return capability to record a customer transaction consisting of any combination of issued or returned items.

2.   A return capability to process quickly the return of borrowed items. A clerk would use this function to process the return of lawn mowers.

3.   A capability to identify the status of and/or process the return of a single borrowed item. A serial number is entered to identify a borrowed item left by a customer.

Before items can be issued to or received from accounts and customers, the accounts, customers, and inventory items must have been entered into the SHSC Management System. Chapters 8 and 9 describe how to do this.

Selecting *Issue/Return* from the MAIN MENU displays a screen (Figure 4-1) for choosing one of the alternatives:

```
┌──────────────────────────────────────────────┐
│  ┌────────────────────────────────────────┐  │
│  │           ISSUE/RETURN MENU            │  │
│  └────────────────────────────────────────┘  │
│  Main Menu                                    │
│  Issue/Return Mode                            │
│  Return Only Mode                             │
│  Identify Returned Item                       │
│  Consumable Usage Display Parameter           │
└──────────────────────────────────────────────┘
```

Figure 4-1. ISSUE/RETURN MENU.

4.1   Issue/Return Mode

4.1.1 Steps to Enter a Transaction

To access *Issue/Return*, choose *Issue/Return* from the MAIN MENU. Following is a step-by-step guide for entering and closing transactions. The examples assume that data has been entered into at least the inventory and customer data files.

STEP 1 - Selecting a Customer Record/Account

Follow the instructions in section 3.6.1 to select a customer and account. The screen shown in Figure 4-2 will then appear.

```
+-----------------------------------------------------------------------+
| Close Transaction    List Overdues    List Outstanding    List Facility|
+-----------------------------------------------------------------------+
|  Customer ID: 084423087   Account ID: 084423087   Today's Date: 03/09/90|
|    Last Name: DODGSON                            Consumable Usage($)    |
|   First Name: CHARLES     Unit Type: Family              Limit: 3000    |
|  Facility ID: P48938      Address:                     Current:    0    |
|                                                                        |
|  Catalog #    Description                  C/T/P I/R Qty Due Date Time  |
|  ----------------------------------------------------------------------|
|                                                     0   / /      :      |
|                                                                        |
|                                                                        |
|                                                                        |
|                                                                        |
|                                                                        |
|                                                                        |
+-----------------------------------------------------------------------+
| Type or Wand in Catalog #.  F8 to input from portable Barcode Unit.    |
| ↕ scrolls; F5 Transaction Menu; F4 Add a line; DEL delete a line; F2 Quit|
+-----------------------------------------------------------------------+
```

Figure 4-2. Issue/Return Mode Screen.

Note that the top line of the Issue/Return screen contains the TRANSACTION MENU, which allows the operator to close transactions, to list overdue and outstanding items for the account, and to list the description of the account's facility. After identifying a customer or account, the TRANSACTION MENU is accessed by pressing F5. The menu is similar to the other menus (except for the horizontal, rather than vertical arrangement of choices). Use the arrow keys to highlight through the choices, and press Enter to make the selection.

The Consumable Usage Limit and Current, near the top on the right indicates and tracks usage against a dollar limit value of consumable item usage during a user-defined time period. Section 4.5 describes how to set these limits.

If the customer has any overdue equipment, the *List Overdues* selection of the TRANSACTION MENU at the top of the screen flashes. By pressing F5 to get to the Transaction Menu, and then selecting *List Overdues*, a display of the overdue items for the customer will appear. Although reviewing this overdue list is optional, the operator would certainly do so if local policy prohibited issuing items to customers having overdue items.

The lower half of the screen shown in Figure 4-2 now serves as a multiline, scrollable form for entering the items the customer obtains from and/or returns to the Self-Help Center during this visit. Each line of this form represents the issue or return of a single item. The columns of the form are:

1. Catalog #   Catalog number of the item
2. Description   First line of item's description

4-2

3.	C/T/P	Consumable issue, temporary loan, permanent loan
4.	I/R	Issue or return of an item
5.	Qty	Quantity issued or returned
6.	Due Date	For temporary loan
7.	Due Time	For temporary loan
8.	Serial #	For nonconsumables with serial numbers. (This column is off the right edge of the transaction menu screen. Step 7 explains access and use of this column.)

Steps 2 through 9 explain the use of these columns.

STEP 2 - Enter the Inventory Item's Catalog Number

Enter the Self-Help catalog number for the inventory item, and press Enter. The system displays (Figure 4-3) the description of the inventory item, including the location within the storeroom (if this information was entered for the item). The Message Box shows inventory availability and authorization information. The following steps explain the use of the remaining data fields.

```
 Close Transaction      List Overdues     List Outstanding      List Facility

  Customer ID: 084423087      Account ID: 084423087   Today's Date:   03/09/90
    Last Name: DODGSON
   First Name: CHARLES          Unit Type: Family
  Facility ID: P48938            Address:

  Catalog #      Description                   C/T/P I/R Qty Due Date Time
 -----------------------------------------------------------------------------
  00000035       LAWN MOWER                      T    I    1 03/09/90 18:00






               ┌───── Message Box ─────┐                          ┌Location┐
               │ Available:  10         │                         │Aisle:  │
               │ Authorized for item.   │                         │  Row:  │
               └───────────────────────┘                         │  Bin:  │
                                                                  └────────┘
 Enter T for Temporary Loans, P for Permanent Issues.
 ↕ scrolls; F5 Transaction Menu; F4 Add a line; DEL delete a line; F2 Quit
```

Figure 4-3. Issue/Return Mode Screen with Entered Inventory Item.

4-3

STEP 3 - Indicate Type of Issue (C/T/P)

There are two types of inventory items: consumable and nonconsumable. The type is determined at the time the inventory item is entered into the system (see Chapter 8, "Edit Inventory").

If the item is a consumable item, the C/T/P field automatically shows a C for Consumable. The C/T/P field cannot be changed for consumable items.

For nonconsumable items, indicate either T for a Temporary Nonconsumable Issue, or P for a Permanent Nonconsumable Issue. T appears by default, but enter P if appropriate. The I/R (for Issue or Return) column defaults to I, and the quantity defaults to 1. For a T entry, the due date and time defaults to values corresponding to the default loan period for that item. (Chapter 8, "Edit Inventory," explains establishing default loan periods.)

Figure 4.3 represents the situation for a lawn mower, a serial numbered, nonconsumable item, issued for temporary loan. .

STEP 4 - Indicate Whether an Issue or Return Transaction

The program defaults I/R to I, the quantity to 1, and calculates the Due Date and Time. These defaults can be changed as needed by the following steps.

Enter I or R where:

       I - Issue an inventory item
       R - Return an inventory item.

The default value is I, but may be changed to R as needed when the I/R field is highlighted. If changed to R, any Due Date and Time calculated for a Temporary Nonconsumable Issue are deleted.

STEP 5 - Enter Quantity of the Inventory Item (for consumable items and nonconsumable items without serial numbers)

Enter the number of items to issue or return. For serial numbered, nonconsumable items, this quantity cannot be changed from the default value of 1, because a serial number must be entered for each item.

STEP 6 - Enter the Due Date and Due Time (for nonconsumable temporary issues only)

For temporary issues of nonconsumable items, default values of the due date and time are defaulted to either the current date and time, or to the date and time calculated from the default days and hours of loan established for that item in the inventory database. Chapter 8, "Edit

Inventory," discusses how to set these defaults. For permanent issues and for consumable issues, the due date and time are not and cannot be entered.

The operator may change the calculated default due date and/or due time values by typing the desired values. Pressing Enter accepts a value.

STEP 7 - Enter Item Serial Number (for issue and returns of nonconsumables with serial numbers only)

After you type or accept the due time, the display scrolls to the left, exposing the serial number column on the right edge of the screen. Enter the serial number of the item being borrowed or returned. For item returns, the serial number must be entered. For issues, the serial number may be left blank at this time, but it must be completed before closing out the customer's transactions (described in Step 9). (By not requiring immediate entry of the serial number, the Self-Help Center attendant may type in several items before going to the stock area to retrieve any serial numbered items.)

The following screen (Figure 4-4) appears:

```
┌─────────────────────────────────────────────────────────────────────────┐
│ Close Transaction    List Overdues    List Outstanding    List Facility   │
├─────────────────────────────────────────────────────────────────────────┤
│  Customer ID :084423087    Account ID :084423087   Today's Date : 03/09/90│
│   Last Name :DODGSON                                Consumable Usage($)    │
│   First Name :CHARLES       Unit Type :Family              Limit: 3000     │
│   Facility ID :P48938        Address :                     Current:    0   │
│                                                                            │
│ Description                 C/T/P I/R Qty Due Date Time  Serial Number     │
│ ------------------------------------------------------------------------   │
│ LAWN MOWER                    T    I    1 03/09/90 13:40                    │
│                                                                            │
│                                                                            │
│                                                                            │
│                                                                            │
│       ┌──────── Message Box ────────┐              ┌─Location ─┐           │
│       │ Available:    10            │              │ Aisle:    │           │
│       │ Authorized for item.        │              │  Row:     │           │
│       └─────────────────────────────┘              │  Bin:     │           │
├─────────────────────────────────────────────────────────────────────────┤
│ Enter serial number of returned item.                                     │
│ ↕ scrolls; F5 Transaction Menu; F4 Add a line; DEL delete a line; F2 Quit  │
└─────────────────────────────────────────────────────────────────────────┘
```

Figure 4-4. Issue/Return Mode Screen at Serial Number Prompt

An error message appears if (1) for an issue, the item with the indicated serial number is unavailable for loan, or (2) for a return, the item with the indicated serial number has not been

borrowed under the current customer's account. Also, if running Self-Help on a network environment, a message will appear if the same serial numbered item is currently in a transaction on another workstation.

STEP 8 - Enter Next Catalog Number, or Edit Previous Lines

Either (1) press the **down arrow** key to advance to a blank line, and return to Step 2-Enter an Inventory Catalog Number, or (2) press the **up arrow** key to edit previous lines. Pressing **F4** will add a new line to the bottom of the list of transactions. Pressing **DEL** will delete the transaction where the cursor sits.

After the list of transactions has been entered as desired, proceed to Step 9.

STEP 9 - Close the Customer Transaction

Press **F5** to activate the Transaction Menu, located at the top of the screen. The *Close Transaction* function will initially be highlighted. Upon selecting it, a menu (Figure 4-5) will appear, containing three choices: *Process Customer Transaction, Discard Customer Transaction,* and *Return to Transaction List.*

```
┌──────────────────────────────────────────────────────────────────────┐
│ Close Transaction      List Overdues    List Outstanding    List Facility │
├──────────────────────────────────────────────────────────────────────┤
│ C┌───────────────────────────┐ t ID :084423087   Today's Date : 03/13/90 │
│  │ Process Customer Transaction │                   Consumable Usage($)    │
│  │ Discard Customer Transaction │ Type :Family              Limit: 3000    │
│ F│ Return to Transaction List   │ ress :                   Current:    0   │
│  └───────────────────────────┘                                            │
│                                                                            │
│ Catalog #      Description              C/T/P I/R Qty Due Date Time         │
│ -----------------------------------------------------------------          │
│ 00000035       LAWN MOWER                  T    I    1 03/13/90 11:41       │
│ 00000034       GARDEN RAKE                 P    I    1  /  /   00:00        │
│ 00000036       FAUCET WASHER               C    I    2  /  /   00:00        │
│                                                                            │
│                                                                            │
│                                                                            │
│                                                                            │
│      ┌──── Message Box ────┐                         ┌Location ┐           │
│      │ Available:  20       │                         │Aisle:   │           │
│      │ Authorized for item. │                         │  Row:   │           │
│      └─────────────────────┘                         │  Bin:   ┘           │
├──────────────────────────────────────────────────────────────────────┤
│ Process or discard the customer transaction.                              │
│ ESC-Cancel                                                                 │
└──────────────────────────────────────────────────────────────────────┘
```

Figure 4-5. Issue/Return Screen Showing Close Transition Function.

Choosing *Discard Customer Transaction* will clear the data entry screen, and leave the system ready for another customer. The database is not updated with any of the items that were entered on the screen.

Choosing *Process Customer Transaction* will update all data files with the issues and returns entered for the account and customer. Reports describing the items issued and returned are printed. Depending on local policy, the customer may be asked to sign these reports. If the report is printed on two-ply sheets, the customer can be given the duplicate copy. In some cases, there may be reason to not print a transaction receipt at all. A prompt appears when closing the transaction which allows the option to print the receipt or omit the receipt. In addition, a shop may wish to print multiple copies of a transaction receipt. Once a receipt has been generated, a prompt appears asking if another receipt should be printed. This also is a benefit if a printer error loses the first receipt. The receipt printing options have no effect on the way a transaction updates the program databases.

Before selecting *Process Customer Transaction*, the printer must be on and ready to print.

The printed reports are tagged with the date and time in the upper right hand corner. The Self-Help Center may either file these by account, or keep them filed by the date and time tag. Because the reports probably will not have to be referred to again, the second approach is recommended. The necessary receipts can be searched by date and time if the hard copy is needed to resolve disputes between the store and a customer.

After printing the reports, the program clears the screen, and the operator can either enter the next customer or press F2 to return to the MAIN MENU.

4.1.2 Overdue and Outstanding Loans

To list information about the account's overdue and outstanding items from the Transaction Menu, use the **right** and **left arrow** keys to highlight the desired selection, and then press **Enter**.

4.1.3 List Facility

The *List Facility* option leads to a menu set which allows the operator to view/edit facility information and view all consumable usage either by facility, or by customer identification. To select the List Facility option press the left or right arrow keys to move the highlight. Cover the List Facility option and press [Enter]. The menu will pull down, showing the above mentioned items.

Facility Info

To view/edit facility information, use the up or down arrow keys to move the highlight bar. Cover the *Facility Info* selection and press [Enter]. The screen will then show the items which

describe the facility. The operator can choose to view this information or edit the existing information. If this selection is chosen and there is no facility information defined, the operator can choose to fill in the information and add it to the facility database? To exit without saving any changes or a view, press **F2**. If data has been edited press **F10** to save. Upon either of these keypresses, the screen will clear and return to the transaction menu.

Facility Usage

To select the *Facility Usage* selection, move the highlight by pressing up arrow or down arrow. Cover the Facility Usage selection with the highlight bar and press [Enter]. This will list all consumable items to date for the particular facility currently in the transaction. The list will include all consumable data which is stored in the consumables database. Sorted by date, this will give the operator a quick way to see the usage activity of a facility. The list will show one screen of information and require a keypress to scroll through the next screen. Pressing **PgDn** will abort the listing. If there is no consumable data for the facility, the program will simply return to the transaction screen. Any abort will also return to the transaction screen.

Customer Usage

To select the *Customer Usage* selection, move the highlight by pressing up arrow or down arrow. Cover the Customer Usage selection with the highlight bar and press [Enter]. The list that generates from this selection is much like the Facility Usage selection, except it generates the list for the customer currently in the transaction. All key presses are the same as the Facility Usage listing.

4.1.4 Leaving Issue/Return

To leave the Issue/Return screen, press **F2** or **F10**, whichever is appropriate.

4.2   Return Only Mode

For this mode, the initial screen image allows input of an account or customer number, as in the Issue/Return mode above. The computer displays the account's customers (in the upper right portion of the screen) and outstanding temporary loans (in the center of the screen). The operator can scroll up and down the loan list and mark items that have been returned by pressing the **Del** key or typing the quantity of items returned.

Pressing **F8** switches to (and back from) the list of permanent issues to the account.

To record the marked items from both lists as returned, and to print a returned item receipt for the customer, press **F5** to access the Transaction Menu (Figure 4-6), and select *Close Transaction*. From the menu that immediately appears, choose *Process Customer Transaction*.

```
┌─────────────────────────────────────────────────────────────────────┐
│ Close Transaction     List Overdues     List Outstanding    List Facility │
├─────────────────────────────────────────────────────────────────────┤
│ Account ID  : 084423077      Customers : 084423077  DODGSON, CHARLES │
│ Unit Type   : Family                     084423078  DODGSON, ALICE   │
│ Facility ID : P48938                                                 │
│ ..................................................................... │
│                    Outstanding Temporary Loans                       │
│  Qty                                              Qty Customer        │
│  Ret Catalog #     Description        Serial #    Iss  ID            │
│ ..................................................................... │
│   0  00000035      LAWN MOWER         22           1  084423077      │
│                                                                     │
│                                                                     │
│                                                                     │
│                                                                     │
│                                                                     │
├─────────────────────────────────────────────────────────────────────┤
│ Del to return quantity 1, or type quantity returned.                │
│ F5-Transaction Menu      F8-Mark returned Permanent Items.          │
└─────────────────────────────────────────────────────────────────────┘
```

Figure 4-6. Return Only Mode Screen.

4.3   Identify Returned Item

From the Issue Return Menu, select *Identify Returned Item* to enter a serial numbered item that a customer has dropped off. The screen first requests a serial number. If more than one catalog number has the indicated serial number on loan, the catalog number must also be indicated. Once an item has been identified, the account and borrowing customer appear on the screen, and the operator may enter whether the item has been returned. No receipt is printed. The Temporary Loan Identification screen (Figure 4-7) will accept this information.

```
┌─────────────────────────────────────────────────────────────────────┐
│                    IDENTIFY TEMPORARY LOAN ITEM                      │
│                                                                     │
│ Serial Number: 22                                                   │
│    CATALOG #: 00000035          Issued Qty:  1                      │
│    DESCRIPTION: LAWN MOWER                                           │
│                                                                     │
│                                                                     │
│    LOANED TO:                                                       │
│       Customer: 084423077          Name: DODGSON, CHARLES          │
│        Account: 084423077      Facility: P48938                    │
│        Address:                                                     │
│                                                                     │
│                                                                     │
│                Has item been returned(Y/N)?                        │
│                                                                     │
├─────────────────────────────────────────────────────────────────────┤
│ F2-Issue/Return Menu                                                │
│                                                                     │
└─────────────────────────────────────────────────────────────────────┘
```

Figure 4-7. Temporary Loan Identification Screen.

4-9

4.4   Consumable Usage Display Parameter

Selecting this option from the Issue/Return Menu allows setting of consumable usage limits which, if exceeded, produce a warning message on the screen during issue return mode. By selecting this option, you may complete the Consumable Usage Display Parameters screen (Figure 4-8).

```
              Self-Help Service Center Management System


                   Consumable Usage Display Parameters


                  Range: From Mo/Yr: 02/94
                         Thru Mo/Yr: 11/94

            Default Limits: Family: 3000
                           Barrack: 2000
                     .      Others: 1000




Enter range of dates to display consumable usage.
F2-ABORT!   F10-Save Changes!
```

Figure 4-8. Consumable Usage Display Parameters Screen.

Completing the above screen would, for example, produce a warning message on the Issue/Return Mode screen if the barracks account consumable issues between 02/94 and 11/94 had exceeded $2000.

4-10

5 EQUIPMENT REPAIR

The *Equipment Repair* selection allows recordkeeping of equipment and tool items sent out for repair and the receipt of these items when they are returned. Choose *Equipment Repair* from the MAIN MENU and press **Enter**. The EQUIPMENT/REPAIR MENU (Figure 5-1) appears:

```
┌──────────────────────────────┐
│ ┌──────────────────────────┐ │
│ │ EQUIPMENT REPAIR MENU     │ │
│ └──────────────────────────┘ │
│  Main Menu                   │
│  Send Item for Repair        │
│  Receive Repaired Item       │
└──────────────────────────────┘
```
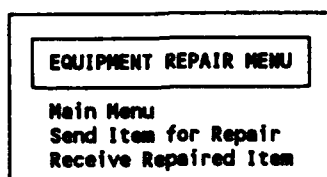
Figure 5-1. EQUIPMENT REPAIR MENU.

5.1 Send Item for Repair

1. Choose *Send Item for Repair* from the EQUIPMENT REPAIR MENU. The Send Item for Repair screen appears.

2. Enter the catalog number of the item to be sent for repair, or enter the category of the item and use the **PgDn** key to select the desired catalog number.

3. Enter the serial number of the item.

4. Enter the date and press **F10** to save the transaction (or **F2** to abort).

5.2 Receive Repaired Item

1. Choose *Receive Repaired Item* from the EQUIPMENT REPAIR MENU.

2. The Receive Repaired Item screen appears.

3. Either

   a. Enter the catalog number of the item to be received, or

   b. If no item with a different catalog number has the same serial number as the item being returned, press **Enter** to advance to the serial number field.

c.   **Either:**

        (1)   Enter the serial number for the received item, or

        (2)   If you entered a catalog number, press **Enter** to display the first item with that catalog number in repair. **PgDn** scrolls through all such items until you find the desired one.

4.   Enter the labor cost and parts cost information from the invoice or work order for the repair, and the date received. Entering Labor Cost and Parts Cost may be skipped (by leaving as zero) if these items are not being tracked.

5.   Press **F10** to save the transaction (or **F2** to abort).

6   REORDERING AND RECEIVING INVENTORY

This choice adjusts the Quantity on Order for individual inventory items, puts all inventory items below their threshold on order, and receives items that are on order. Choose *Reorder/Receive Inventory* from the MAIN MENU. The REORDER/RECEIVE MENU (Figure 6-1) appears:

```
┌──────────────────────────────────────────────────────┐
│              REORDER/RECEIVE MENU                      │
├──────────────────────────────────────────────────────┤
│ Main Menu                                              │
│ Review/Adjust Quantity on Order for individual items   │
│ Review/Order all needed items                          │
│ Receive items ON order                                 │
└──────────────────────────────────────────────────────┘
```

Figure 6-1. REORDER/RECEIVE MENU.

6.1   Review/Adjust Quantity on Order for Individual Items

Select the second choice from the REORDER/RECEIVE MENU, and identify an inventory item. A screen similar to the one shown in Figure 6-2 appears. Enter the additional quantity to be ordered, which is the only value on the screen that may be changed. Press F10 to accept, or F2 to cancel.

```
┌──────────────────────────────────────────────────────────────┐
│                                                                │
│              Self-Help Service Center Management System        │
│                                                                │
│                                                                │
│          Review/Adjust Quantity on Order for Individual Items  │
│                                                                │
│                                                                │
│       Catalog: DE00002              CONSUMABLE                  │
│       Category:                                                 │
│       Desc: SHADE, NOLITE FLEXGLASS, FIBGL                      │
│       VINYL CTD, IVORY, TIP TO TIP 15 3/4 X 72, W/ WOODEN ROLLER,│
│       HARDWARE, GROMMET, AND SHADE PULLS                        │
│                                                                │
│       Available   On loan   Inoperative   On Order   In System │
│           8    +     0   +       0     +     22    =     30     │
│                                                                │
│                                                                │
│       Additional Qty to Order:   0                             │
│                                                                │
│                                                                │
├──────────────────────────────────────────────────────────────┤
│ Enter the quantity to put ON order.                            │
│ F2-Discard Order   F10-Save Order                              │
└──────────────────────────────────────────────────────────────┘
```

Figure 6-2. Review/Adjust Order Quantity.

6.2 Review/Order All Needed Items

Select *Review/Order All Needed Items* from the REORDER/RECEIVE MENU. The program will spend some time to determine which inventory items require reordering, and then it will print the following menu (Figure 6-3).

```
┌─────────────────────────────────────────────────────────────────┐
│           REVIEW/ORDER ALL NEEDED ITEMS MENU                      │
├─────────────────────────────────────────────────────────────────┤
│ Return to REORDER/RECEIVE Menu                                    │
│ Review all needed items (short form)                              │
│ Review all needed items (long form)                               │
│ Print reorder list and Update Database's Quantities on Order      │
└─────────────────────────────────────────────────────────────────┘
```

Figure 6-3. REVIEW/ORDER ALL NEEDED ITEMS MENU.

The second and third choices allow reviewing and revising the recommended reorder quantities for items identified to reorder. Neither of these choices updates the quantities on order.

If either *Review All Needed Items* choice is selected, a horizontal menu (Figure 6-4) appears at the bottom of the screen, asking how the items should be sorted for the review:

```
┌──────────────────────────────────────────────────────────────┐
│ Review items sorted on:    Catalog #   Category   Supplier     │
└──────────────────────────────────────────────────────────────┘
```

Figure 6-4. Sort Items Prompt.

For *Review All Needed Items (short form)*, the following screen (Figure 6-5) appears:

```
┌──────────────────────────────────────────────────────────────────────┐
│              Self-Help Service Center Management System                │
│                                                                        │
│                                              .. IN    TO    REORDER    │
│   CAT NO   C/N DESCRIPTION        SUPPLIER  SYSTEM  ORDER   LEVEL       │
│                                                                        │
│   DE00002  C   SHADE, NOLITE FLEXGLASS, FIBGL    0    20     10         │
│   DE00023  N   RAKE                             40    10     10         │
│                                                                        │
│                                                                        │
│                                                                        │
│                                                                        │
│                                                                        │
│                                                                        │
├────────────────────────────────────────────────────────────────────────┤
│ Change amounts to reorder as desired. Terminate each change with ENTER. │
│ Use  ↑, ↓, PgUp, PgDn to navigate.   F10 when done.                     │
└────────────────────────────────────────────────────────────────────────┘
```

Figure 6-5. Review Needed Items (short form).

On the short-form screen, the To Order values may be changed by typing over the existing values. Press **Return** after typing in a new number. The up and down arrow keys scroll through the table one line at a time. The **PgUp** and **PgDn** keys scroll a screen at a time. Changes do not become a part of the database until the Reorder List is printed (select the fourth choice on the REVIEW/ORDER ALL NEEDED ITEMS MENU). Press **F10** returns you to the REVIEW/ORDER ALL NEEDED ITEMS MENU.

For *Review All Needed Items (long form)*, the following screen (Figure 6-6) appears:

```
                 Self-Help Service Center Management System



        Catalog: DE00002            CONSUMABLE
        Category: STRU
        Desc: SHADE, NOLITE FLEXGLASS, FIBGL
        VINYL CTD, IVORY, TIP TO TIP 15 3/4 X 72, W/ WOODEN ROLLER,
        HARDWARE, GROMMET, AND SHADE PULLS


        Available   On loan   Inoperative   On Order   In System
            8    +     0    +      0     +     22    =    30

        Additional Qty to Order:  20



  Change amounts to reorder as desired. Terminate each change with Enter.
 Use !, ! PgUp, PgDn to navigate.  F10 when done.
```

Figure 6-6. Review Needed Items (long form).

On this screen, only the Additional Quantity to Order can be changed. The up and down arrows, and **PgUp** and **PgDn** keys scroll through the items that need to be reordered. Pressing **F10** returns to the REVIEW/ORDER ALL NEEDED ITEMS MENU. -

While the second and third choices on the REVIEW/ORDER ALL NEEDED ITEMS MENU allow reviewing and revising quantities to reorder, it is the fourth choice, *Print Reorder List and Update Database Quantities on Order*, which actually updates quantities reordered in the inventory databa e. This choice also prints a report of all reordered quantities. Activating the fourth choice without first selecting the second and third choices updates the reorder quantities in the inventory database without reviewing the quantities.

6.3   Receive Items ON Order

Use this choice from the REORDER/RECEIVE MENU to indicate that previously ordered items have been received. The program will prompt for the catalog number of the item received and then for the quantity received. Press **F10** after entering the quantity, and the program will decrease the quantity on order and increase the quantity available by the indicated amount.

7   SUPPLIERS

The system can keep a list of suppliers for different inventory items. Records can be added, edited, or deleted; suppliers are identified by a code of up to four characters. One supplier code may be entered for each inventory item. This feature need not be used if no inventory items are assigned to suppliers.

From the MAIN MENU, choose *Edit Suppliers*, and press Enter. The SUPPLIERS MENU (Figure 7-1) appears:

```
┌─────────────────────────┐
│ SUPPLIERS MENU          │
├─────────────────────────┤
│ Main Menu               │
│ Edit Suppliers          │
│ Add Suppliers           │
│ Delete Suppliers        │
└─────────────────────────┘
```

Figure 7-1. SUPPLIERS MENU.

7.1   Edit Suppliers

1.   Choose *Edit Suppliers* from the SUPPLIERS MENU, and press Enter.
2.   Enter the supplier ID. (The screen in Figure 7-2 appears.)
3.   Make changes to information appearing on the screen by moving to and typing over it.
4.   Press F10 to save changes (or F2 to discard).

```
┌──────────────────────────────────────────────────────────┐
│           Self-Help Service Center Management System       │
│                                                            │
│                    EDIT Supplier       _                   │
│                                                            │
│                                                            │
│       Supplier: DON1                                       │
│                                                            │
│       Name:    DON'S HARDWARE                              │
│       Phone:   217-333-1000                                │
│       Address: 50 EAST MAIN                                │
│                ARTHUR, USA                                 │
│                                                            │
│       Contact: DON TWENLEY                                 │
│                                                            │
│                                                            │
│                                                            │
│ F2-Discard Changes    F10-Save Changes    ↑↓-Prev/Next Field│
│                                                            │
└──────────────────────────────────────────────────────────┘
```

Figure 7-2. EDIT Supplier Screen.

7.2   Add Suppliers
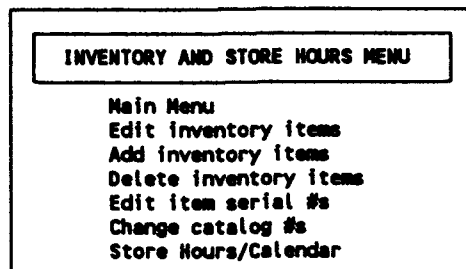
1.   Choose *Add Suppliers* from the SUPPLIERS MENU, and press **Enter**.

2.   Enter the ID for the new supplier. Enter name, phone number, address, and contact information on the screen (similar to the EDIT suppliers screen).

3.   Press **F10** to save changes (or **F2** to discard).

7.3   Delete Suppliers

1.   Choose *Delete Suppliers* from the SUPPLIERS MENU, and press **Enter**.

2.   Enter supplier number. (Information for the supplier will be displayed.)

3.   Press **F10** to delete (or **F2** not to delete).

8   INVENTORY AND STORE HOURS EDIT

The *Inventory and Store Hours* function lets you add, delete, and revise inventory items and store hours information. Choose *Inventory and Store Hours* from the MAIN MENU, and press Enter. The following menu (Figure 8-1) appears:

```
┌─────────────────────────────────────┐
│ ┌──────────────────────────────────┐│
│ │ INVENTORY AND STORE HOURS MENU   ││
│ └──────────────────────────────────┘│
│        Main Menu                     │
│        Edit inventory items          │
│        Add inventory items           │
│        Delete inventory items        │
│        Edit item serial #s           │
│        Change catalog #s             │
│        Store Hours/Calendar          │
└─────────────────────────────────────┘
```

Figure 8-1. INVENTORY AND STORE HOURS MENU.

8.1   Edit Inventory Items

Choose *Edit Inventory Items* from the INVENTORY AND STORE HOURS MENU, and press Enter. Either: (1) Type the catalog number of the item to edit, **then Enter**. Figure 8-3 (for consumable items) or Figure 8-4 (for nonconsumable items) will appear, displaying all the information for the indicated item, or (2) Press Enter and indicate a category. Either Figures 8-3 or 8-4 will appear for the first item in the category. Use **PgUp** or **PgDn** to scroll through the category items. Press **Enter** to edit a desired item. **F5** provides an option to search for inventory items.

Searching Items through the Inventory Search Menu

There are three possible search methods: (1) search by catalog number, (2) search by category, (3) search by National Stock Number (NSN). Select a search method by highlighting the menu option. A box will appear allowing entry of the item to search. A partial number can be searched. For example: If 8510 was entered in the entry box, a picklist will appear showing all cases of inventory starting with 8510. The type of item (catalog, category, or NSN) will depend upon the search type selected. The search procedure will not search or locate blank numbers in any of the search fields (catalog number, category, or NSN). If [Enter] is pressed without partial or full entry of a search string, the picklist will show all inventory items. This feature will not work if a blank search field exists. For example: If catalog search was selected and [Enter] was pressed without an entry in the search box, there can be no blank catalog numbers in the database. If there are blank catalog numbers in the database, the prompt will remain allowing input, and the picklist will not appear. An example of the search box and picklist is shown below in Figure 8-2.

```
┌─────────────── EDIT Inventory Item ────────────────┐
│  Catalog:                                      '  ) │
│                                                   ! │
│  Category:                                          │
│                                                     │
│                                                     │
│                                                     │
│              ┌┤ Picklist Search Menu ├┐             │
│              │Catalog Search List     │             │
│              │Category Search List    │             │
│              │NSN Search List         │             │
│              │Exit Search Menu        │             │
│              └────────────────────────┘             │
│                                                     │
│                                                     │
│                                                     │
│                                                     │
│  Type or wand-in the Self-Help CATALOG # or ENTER to go to CATEGORY field.
│  F2-Inventory Menu  F5 Search Menu
```

Figure 8-2. Showing Picklist after F5 Pressed. (Select which method to search.)

```
┌─────────────── EDIT Inventory Item ────────────────┐
│  Catalog:                                           │
│                                                     │
│  Category:                                          │
│       ┌──────────────────────────────────┐  ▴ ▾   :│
│       │              ─                    │         │
│       │   Partial or Full NSN Code: 3750  │  ▪ ▪   │
│       │                                   │         │
│       └[Esc] to Abort──────────────────────┘        │
│                                                     │
│         ┌──────────┤ Pick NSN Code ├────────┐       │
│         │3750-00-171-7182    RAKE, GARDEN, STEEL ▮  │
│         │3750-00-641-5587    SHEARS, PRUNING    │   │
│         │3750-00-903-0720    RAKE, LAWN, LEAF   │   │
│         │3750-00-951-1585    SHEARS, HEDGE      │   │
│         │3750-00-959-3490    SPRINKLER, LAWN    │   │
│         └──────────────────────────────────────┘   │
│                                                     │
│  Type or wand-in the Self-Help CATALOG # or ENTER to go to CATEGORY field.
│  F2-Inventory Menu  F5 Search Menu
```

Figure 8-2A. Showing Picklist after Entry in NSN Look-up.

```
========================= EDIT Inventory Item =========================
  Catalog: 00000035          Type: Nonconsumable Item     Serials (y/n): Y
-----------------------------------------------------------------------
Category: GARDEN
NSN: 7184-83-274-9384              Authorization: FBO  Unit of Issue: EA
Description: LAWN MOWER


Location    Aisle:      Row:       Bin:
Supplier:                                        Last Cost:  175.00
-----------------------------------------------------------------------
Default Days of Loan:  1          Available:    20
Default Hours of Loan: 0          On Loan:       4
                                  Inoperative:   3
                                  On Order:      6

  +------------------- Reorder Levels --------------------+
  | Min. Threshold            Seasonal Exceptions         |
  |                    1-Start:          2-Start:          |
  |   Level:   20      End:              End:              |
  |   Qty:      6      Level:    0       Level:    0       |
  |                    Qty:      0       Qty:      0       |
  +-------------------------------------------------------+
-----------------------------------------------------------------------
Enter: C-Consumable Item  N-Nonconsumable Item    <┘-Default
F2-Discard Changes   F10-Save Changes   �11-Prev/Next Field
```

Figure 8-3. EDIT Inventory Item Screen (nonconsumable item).


```
========================= EDIT Inventory Item =========================
  Catalog: 00000036          Type: Consumable Item
-----------------------------------------------------------------------
Category: GARDEN
NSN:  459-43-590-9876              Authorization: FBO  Unit of Issue:
Description: LEAF BAGS


Location    Aisle: 5    Row: A    Bin: 15
Supplier:                                        Last Cost:    0.30
-----------------------------------------------------------------------
Direct Exchange Item (y/n): N
  +--------- Monitor Data ---------+     +----- Stock -----+
  | Start Monitoring: 08/15        |     | Available:  250 |
  | End   Monitoring: 11/30        |     | On Order:   100 |
  | Issue Limit:  15               |     +-----------------+
  +----------------- Reorder Levels ----------------------+
  | Min. Threshold            Seasonal Exceptions         |
  |                    1-Start:  09/01   2-Start:  03/01   |
  |   Level:   50      End:      11/30   End:      06/30   |
  |   Qty:     50      Level:   300      Level:   150      |
  |                    Qty:     100      Qty:      75      |
  +-------------------------------------------------------+
-----------------------------------------------------------------------
Enter: C-Consumable Item  N-Nonconsumable Item    <┘-Default
F2-Discard Changes   F10-Save Changes    <┘-Next Field
```

Figure 8-4. EDIT Inventory Item Screen (consumable item).

Make any necessary changes by typing over the information appearing on the screen. (The fields are described below.) Press **F10** to save changes (or **F2** to discard).

The following data elements are common to both consumable and nonconsumable items. ONLY THE CATALOG NUMBER AND THE DESIGNATION AS CONSUMABLE OR NONCONSUMABLE ARE REQUIRED. (For a definition of "consumable" and "nonconsumable," see Section 3.4.1.)

1. Catalog number: Locally defined number for an item. It is required and may have up to 15 alphanumeric characters. If using barcoding for inventory, this could be the barcode on the item's packaging.

2. Consumable or Nonconsumable: Indicated by C or N. When editing an existing item, press **Enter** to keep the current value.

3. Category: Designates items as for plumbing, electrical, housewares, and so forth, but may be used however desired.

4. Authorization: A character string containing one or more of the letters F, B, and O, to designate whether the item is authorized for family housing, barracks, and/or other facilities.

5. Unit of Issue: Any two-character code (such as EA or FT). (May be left blank.)

6. Description: Consists of up to three lines. The first line may have up to 30 characters, while the other two may have up to 60 characters each.

For consumable items, the following optional data elements may be completed:

1. Direct Exchange: Enter Y for Yes if the customer is usually expected to return an old item in order to receive a new item. (This is determined by local policy.) Direct exchange often applies to items such as window shades and light bulbs. Designate N for No if direct exchange is not required. When a direct exchange item is issued to a customer, a message will appear on the screen advising that the item is a direct exchange. This message does not mean that the item cannot be issued to the customer since this also depends on local policy.

2. Start Monitoring, End Monitoring Dates: Used only if desiring to restrict the number of some item issued to any one customer between specified dates (month and day). For example, this could be used to restrict issuing of leaf bags in autumn.

3. Issue Limit: Limit of the number to be issued to any customer between the Start Monitoring and End Monitoring dates.

4. Available: Number in stock available for issue.

5. On Order: Number on order.   ')

For consumable items, the following data elements apply:

1. The total number in stock plus the number on order represents the number IN SYSTEM.

2. The number available. If a nonzero value is not entered, the program prints a warning that none of the item is available when the operator attempts to issue the item.

3. The number on order.

For nonconsumable items, the following data elements apply:

1. Serials (Y/N): Indicates whether the individual items issued have serial or other identifying numbers. For example, lawn mowers issued can be identified by number, but rakes cannot.

2. Default Days and Hours of Loan: The program adds these values to the current date and time to calculate the due date and time for items issued on temporary loan. If the due date and time fall outside store hours, the program adjusts them to one hour after opening on the store's next business day. The calculated values can always be revised manually. Section 8.6, "Store Hours/Calendar," describes how to set the store's daily and holiday hours for calculating the due dates and times for temporary loans.

3. Available: The number of items available for loan.

4. Inoperative: The number of items not operating or in for repair.

5. On Loan: The number of items currently on loan.

6. On Order: The number of items on order.

For nonconsumable items, the following qualifications apply:

1. The number IN SYSTEM is the sum of the items available, inoperative, on loan, and on order.

2. If the Serials field is Y, the number of items available, inoperative, and on loan are calculated, and operators cannot modify them. The *Edit Item Serial #s* selection on the INVENTORY AND STORE HOURS MENU is used to enter individual items into the databases.

For both consumable and nonconsumable items, in the Reorder Levels entries (lower portion of Figures 8-3 and 8-4 up to three reorder thresholds and reorder quantities may be specified. These are used by the functions of the REORDER/RECEIVE INVENTORY section of the program (Chapter 6) to recommend the quantity of each item to reorder. For consumable item 00000036 above, the default is set for when the number IN SYSTEM falls below 50, and the program will recommend a reorder for 50. However, between 1 September and 30 November, when the number IN SYSTEM falls below 300, the program will recommend a reorder of 100; and between 1 March and 30 June, when the number IN SYSTEM falls below 150, the program will recommend a reorder of 75. The entry of reorder levels and quantities are optional.

8.2 Add Inventory Items

1.   Choose *Add Inventory Items* from the INVENTORY AND STORE HOURS MENU, and press **Enter**. (The Add Inventory Item screen appears.)

2.   Enter the catalog number of the new item. The following screen (Figure 8-5) will appear:

```
━━━━━━━━━━━━━━━━━━ ADD Inventory Item ━━━━━━━━━━━━━━━━━
  Catalog: 33                Type: Consumable Item
---------------------------------------------------------------
Category:
NSN:         -   -   -              Authorization: FBO  Unit of Issue:
Description:


Location    Aisle:      Row:       Bin:
Supplier:                                        Last Cost:    0.00
---------------------------------------------------------------
Direct Exchange Item (y/n): N
 ┌──────── Monitor Data ────────┐      ┌──── Stock ───┐
   Start Monitoring:                    Available:    0
   End   Monitoring:                    On Order:-    0
   Issue Limit:    0
 ┌──────────── Reorder Levels ──────────────┐
   Min. Threshold          Seasonal Exceptions
                     1-Start:         2-Start:
   Level:    0       End:             End:
   Qty:      0       Level:    0      Level:    0
                     Qty:      0      Qty:      0

Enter: C-Consumable Item   N-Nonconsumable Item    ↵-Default
F2-Discard Changes    F10-Save Changes    ↵-Next Field
```

Figure 8-5. ADD Inventory Item (consumable).

3. Choose whether the item is Consumable (C) or Nonconsumable (N), and press Enter. (The Consumable (C) type is the default option.) If N is entered to identify the item as nonconsumable, the following screen (Figure 8-6) will appear:

```
┌─────────────────────── ADD Inventory Item ─────────────────────────┐
│   Catalog: 33                    Type: Nonconsumable Item   Serials (y/n): Y │
│ ...................................................................... │
│ Category:                                                            │
│ NSN:       -   -    -            Authorization: FBO  Unit of Issue:  │
│ Description:                                                         │
│                                                                     │
│                                                                     │
│ Location   Aisle:       Row:        Bin:                            │
│ Supplier:                                       Last Cost:    0.00  │
│ ...................................................................... │
│ Default Days of Loan:   0          Available:    0                  │
│ Default Hours of Loan:  0          On Loan:      0                  │
│                                    Inoperative:  0                  │
│                                    On Order:     0                  │
│                                                                     │
│   ┌───────────── Reorder Levels ──────────────────┐                │
│   │ Min. Threshold         Seasonal Exceptions    │                │
│   │                 1-Start:         2-Start:      │                │
│   │  Level:   0     End:             End:          │                │
│   │  Qty:     0     Level:   0       Level:   0    │                │
│   │                 Qty:     0       Qty:     0    │                │
│                                                                     │
├─────────────────────────────────────────────────────────────────────┤
│ Enter a common category under which to sort.                        │
│ F2-Discard Changes    F10-Save Changes    ↕-Prev/Next Field         │
└─────────────────────────────────────────────────────────────────────┘
```

Figure 8-6. ADD Inventory Item (nonconsumable).

4. Indicate Y or N for whether each item has a serial number.

5. For both consumable and nonconsumable items, enter the item's information press F10 to accept, or press F2 to cancel this information. Section 8.1, "Edit Inventory Items," explains use of the fields.

8.3 Delete Inventory Items

1. Choose *Delete Inventory Items* from the INVENTORY AND STORE HOURS MENU, and press Enter. The Delete Inventory Item screen appears.

2. Enter the catalog number of the item you wish to delete, or choose the category and search with the PgDn key. The information for the inventory item is displayed on the screen.

3. Press F10 to delete the item (or F2 not to delete).

8.4 Edit Item Serial Numbers

This selection allows entering individual instances of serial numbered, nonconsumable items, e.g., lawn mowers, hedge trimmers, or circular saws. A serial numbered, nonconsumable item cannot be issued until the item has been entered into the database.

Upon selecting this choice from the INVENTORY AND STORE HOURS MENU, enter a valid catalog number when prompted, and a screen such as that shown in Figure 8-7 appears.

```
            Self-Help Service Center Management System

               ITEM SERIAL NUMBER ADDITION/DELETION

      Catalog: 00000035
      Category:

   ┌──────────────────────────────────────────────────────────────┐
   │ Serial #  .   Date Into Service  # Times Used   Status   Del/New │
   ├──────────────────────────────────────────────────────────────┤
   │ 100         │03/14/89          │26          │A        │         │
   │ 200         │04/09/88          │16          │T        │         │
   │ 300         │05/15/88          │14          │T        │         │
   │ 400         │01/01/88          │32          │R        │         │
   │             │                  │            │         │         │
   │             │                  │            │         │         │
   │             │                  │            │         │         │
   └──────────────────────────────────────────────────────────────┘

 Enter date this item placed in service.
 ↑,↓,PgUp,PgDn scrolls; F4 adds a record; F10 when done; F2 cancels all changes
```

Figure 8-7. ITEM SERIAL NUMBER ADDITION/DELETION Screen.

The screen displays a scrollable table of all of the items with that catalog number that are in the system, sorted by serial number. The Status column indicates whether the item is "A"vailable for loan, on "P"ermanent or "T"emporary loan, or in "R"epair. The Del/New column, initially blank, becomes N for New Items Entered, and D for Deleted Items. No additions, changes, or deletions made to this table become permanent until F10 is pressed. This table is sorted when any data is entered. If items of this catalog number are being entered for the first time, this table appears blank.

To add a new item, press F4. A blank row appears at the top of the table. Enter the serial number, and press Enter. The program redraws the table so that the new serial item appears at the top of the table, and sets the "Date into Service" to the current date, the "# Times used" to 0, the "Status" to A (for Available for Loan), and the "Del/New" column to N (for a New Item). In the above table, entering 500 for the new item's serial number will cause the new item to be

on the first line of the table. Scrolling with the **up arrow** or **PgUp** causes items 100 to 400 to reappear. The Date into Service, Number of Times Used, and Status can be changed for the new item. If the Status is changed to T (for Temporary Loan) or P (for Permanent Loan), a pop-up screen appears asking for the customer/account of the item's borrower. If the borrower information is not entered, the program will delete the new serial numbered item.

To delete an item, move the cursor to the desired row and press the **Del** key. The letter D is placed in the Del/New column. Only items of status Available or In Repair can be deleted. Pressing the **Del** key again undeletes the item (and removes the D from the Del/New column). Deletions become permanent only when the **F10** key is pressed.

If a serial numbered item has already been established, it can only (1) have its Date into Service and # Times Used edited, or (2) be deleted.

After pressing **F10**, the program may take a minute or so to update the database.

8.5 Change Catalog Numbers

1.   Choose *Change Catalog #s* From the INVENTORY AND STORE HOURS MENU, and press **Enter**. The Change Catalog Number screen appears.

2.   Enter the catalog number for the item to be changed, or enter the category. If only the category is entered, a list of items in that category from which to choose will appear.

3.   Enter the new catalog number, and press **Enter**.

4.   The program next requests confirmation of the change. Enter Y for Yes, or N for No.

A delay will occur while the system program updates the catalog number in various data files. This delay can take several minutes in a large database. In a multi-user environment, other users will be shut out of most other functions, while the catalog number is being changed. Catalog number changes should only be done when the store is closed and the database will be available for exclusive use.

8.6 Store Hours/Calendar

The program allows the setting of normal daily hours and special day hours in order to calculate the due dates and times for temporary loans. This choice from the INVENTORY AND STORE HOURS MENU produces the menu: shown in Figure 8-8:

```
┌─────────────────────────────────────┐
│  ┌───────────────────────────┐       │
│  │STORE HOURS/CALENDAR MENU│      │
│  └───────────────────────────┘       │
│  Inventory and Store Hours Menu      │
│  Normal Daily Hours                  │
│  Holiday/Special Hours               │
└─────────────────────────────────────┘
```

Figure 8-8. STORE HOURS/CALENDAR MENU.

8.6.1   Normal Daily Hours

The following screen is for setting the normal daily hours of the Self-Help Store. Opening times before 0600 and closing times past 2200 are not allowed, except that an opening time of 00:00 indicates that the store is not open that day. The default settings are shown in Figure 8-9.

```
┌──────────────────────────────────────────────────────────────┐
│                                                                │
│           Self-Help Service Center Management System           │
│                                                                │
│                    Normal Daily Hours                          │
│                                                                │
│              ┌──────┬───────┬───────┐                          │
│              │      │ Open  │ Close │                          │
│              ├──────┼───────┼───────┤                          │
│              │ SUN  │ 00:00 │ 00:00 │          ' ˅       :     │
│              │ MON  │ 08:00 │ 18:00 │           - .            │
│              │ TUE  │ 08:00 │ 18:00 │                          │
│              │ WED  │ 08:00 │ 18:00 │                          │
│              │ THU  │ 08:00 │ 18:00 │                          │
│              │ FRI  │ 08:00 │ 18:00 │                          │
│              │ SAT  │ 08:00 │ 12:00 │                          │
│              └──────┴───────┴───────┘                          │
│                                                                │
│                                                                │
│ Enter opening time of the store.                               │
│ ↑,↓,PgUp,PgDn scrolls; F10 when done; F2 cancels all changes.  │
└──────────────────────────────────────────────────────────────┘
```

Figure 8-9. Normal Daily Hours Setting.

8.6.2 Holiday/Special Hours
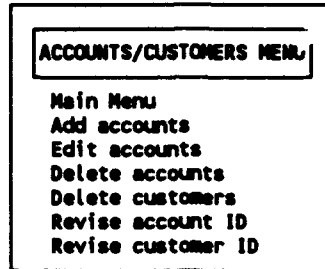
The following screen (Figure 8-10) designates store hours for holidays and special days. Holiday dates should be updated before the holiday next occurs by changing the date. Special days can be deleted once they are past.

```
                          Holiday/Special Hours

        DATE         DESCRIPTION           Open     Close

        01/01/90     NEW YEAR              00:00    00:00
        05/03/90     SPECIAL HOLIDAY       10:00    12:00
        05/28/90     MEMORIAL DAY          00:00    00:00

              .

Enter Date.
!! scrolls; F4 add a line; DEL delete a line; F10 done; F2  cancel all changes
```

Figure 8-10. Holiday Special Hours Setting.

9 ACCOUNTS/CUSTOMERS EDIT

The ACCOUNTS/CUSTOMERS MENU allows the operator to edit, add, and delete customers.

Choose *Accounts/Customers* from the MAIN MENU, and press Enter. The following menu (Figure 9-1) appears:
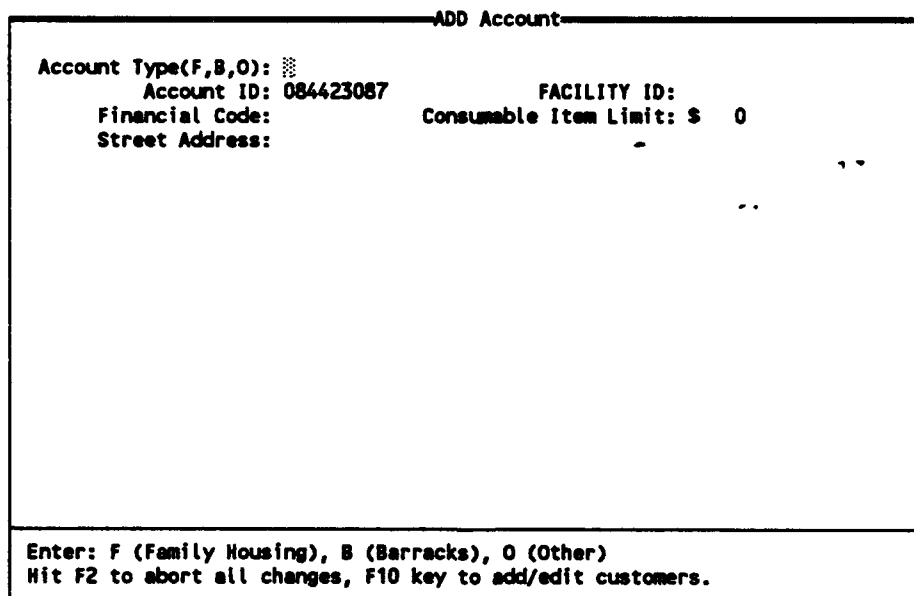
```
┌─────────────────────────────┐
│ ACCOUNTS/CUSTOMERS MENU │
│─────────────────────────────│
│   Main Menu                 │
│   Add accounts              │
│   Edit accounts             │
│   Delete accounts           │
│   Delete customers          │
│   Revise account ID         │
│   Revise customer ID        │
└─────────────────────────────┘
```

Figure 9-1. ACCOUNTS/CUSTOMERS MENU.

9.1 Add Accounts

1. Choose *Add Accounts* from the ACCOUNTS/CUSTOMERS MENU.

2. Enter the ID for the new account. The following screen (Figure 9-2) appears:

```
┌──────────────────────ADD Account──────────────────────┐
│                                                        │
│  Account Type(F,B,O):                                  │
│         Account ID: 084423087         FACILITY ID:     │
│       Financial Code:         Consumable Item Limit: $  0  │
│       Street Address:                        -         │
│                                                   ˙ ˙     │
│                                              ˙ ˙         │
│                                                        │
│                                                        │
│                                                        │
│                                                        │
│                                                        │
│                                                        │
│                                                        │
│                                                        │
│                                                        │
│                                                        │
│                                                        │
│                                                        │
│                                                        │
│                                                        │
│────────────────────────────────────────────────────────│
│  Enter: F (Family Housing), B (Barracks), O (Other)    │
│  Hit F2 to abort all changes, F10 key to add/edit customers. │
└────────────────────────────────────────────────────────┘
```

Figure 9-2. ADD Account Screen.

3.   Indicate the type of account (or press **Enter** to accept the default of family housing), and if desired, enter a financial code and facility number.

4.   Once this information has been entered, press **F10** and the screen will be replaced with one like that shown in Figure 9-3.

```
┌──────────────────────────ADD Account────────────────────────────┐
│                                                                  │
│   Account Type(F,B,O) : F                                        │
│            Account ID : 084423087         FACILITY ID :          │
│         Financial Code :                                         │
│                                                                  │
│                                                                  │
│   D   Cust_ID    Last Name      First     M   Rnk   Home Ph.   Work Ph. │
│      ┌─────────┬──────────────┬──────────┬──┬────┬──────────┬──────────┐│
│      │084423087│              │          │  │    │    -     │    -     ││
│      │         │              │          │  │    │          │          ││
│      │         │              │          │  │    │          │          ││
│      │         │              │          │  │    │          │          ││
│      │         │              │          │  │    │          │          ││
│      │         │              │          │  │    │          │          ││
│      │         │              │          │  │    │          │          ││
│      └─────────┴──────────────┴──────────┴──┴────┴──────────┴──────────┘│
│                                                                  │
│   Editing customer.  Type or wand in Customer ID #.              │
│   F10 saves, F2 discards all changes/additions on this screen.   │
└──────────────────────────────────────────────────────────────────┘
```

Figure 9-3. ADD Customers to New Account.

You can now add customers for this account to this table. The required entries for each customer are ID, last name, and first name. Press **Enter** at the end of any entry to a field. After completing the three required entries, use the **up** and **down arrow** keys to move the cursor to a new blank or to a previously entered customer.

Two optional fields, Start Date and End Date, are not initially displayed because screen width is limited. The program scrolls horizontally to expose these fields when the cursor is moved beyond the Work Phone field. The Start Date field indicates when the customer was first authorized for any account. The End Date field is treated as an expiration date. If expiration dates are activated, a default date will be entered into this field. The user can override the default by entering a date of choice in the field. Activating expiration dates are discussed further in the system setting section.

9-2

One customer can be authorized for more than one account. Thus, if an ID is entered for an existing customer, the program automatically completes the rest of the line. For an existing customer, all information except customer ID can be revised. ' \

The ID for the initial customer added to the account defaults to the account ID. (However, this can be retyped.) The program does not limit the number of customers assignable to an account, although rarely will more than four or five be assigned. The **Del** key deletes a customer from this account. Press **F10** to save or **F2** to discard all changes to both the upper and lower portions of the screen.

Note: If an account has been previously deleted and that number was entered to add the account, the user will be prompted that the account had been previously deleted and asked if they wish to reinstate it.

9.2 · Edit Accounts

1.   Choose *Edit Accounts* from the ACCOUNTS/CUSTOMERS MENU to display the screen shown in Figure 9-4.

```
        Self-Help Service Center Management System

                      Edit Account

      Acct/Cust ID: ▓▓▓▓▓▓▓▓            -
         Last Name:                                    ' ⁻        :
        First Name:
          Facility:                              ·




    Enter Account or Customer ID, or press ENTER to go to name field.
```

Figure 9-4. Edit Account Screen.

2. Select an account, using the above screen, by following the instructions in Section 3.6.1. The screen shown in Figure 9-5 will then appear.

```
┌──────────────────────────EDIT Account──────────────────────────┐
│                                                                 │
│  Account Type(F,B,O):  F                                        │
│          Account ID: 084423087          FACILITY ID: P48938     │
│       Financial Code:            Consumable Item Limit: $3000   │
│       Street Address:                                           │
│                                                                 │
│                                                                 │
│                                                                 │
│                                                                 │
│                                                                 │
│                                                                 │
│                                                                 │
│                                                                 │
│                                                                 │
├─────────────────────────────────────────────────────────────────┤
│  Enter: F (Family Housing), B (Barracks), O (Other)             │
│  Hit F2 to abort all changes, F10 key to add/edit customers.    │
└─────────────────────────────────────────────────────────────────┘
```

Figure 9-5. EDIT a selected account.

3. Edit the account type, the financial code, and the facility, if desired. (The account ID can be changed only through the *Revise Account ID* choice on the ACCOUNTS/CUSTOMERS MENU, discussed in Section 9.5.) Then press *F10 to edit the customers* assigned to this account (Figure 9-6).
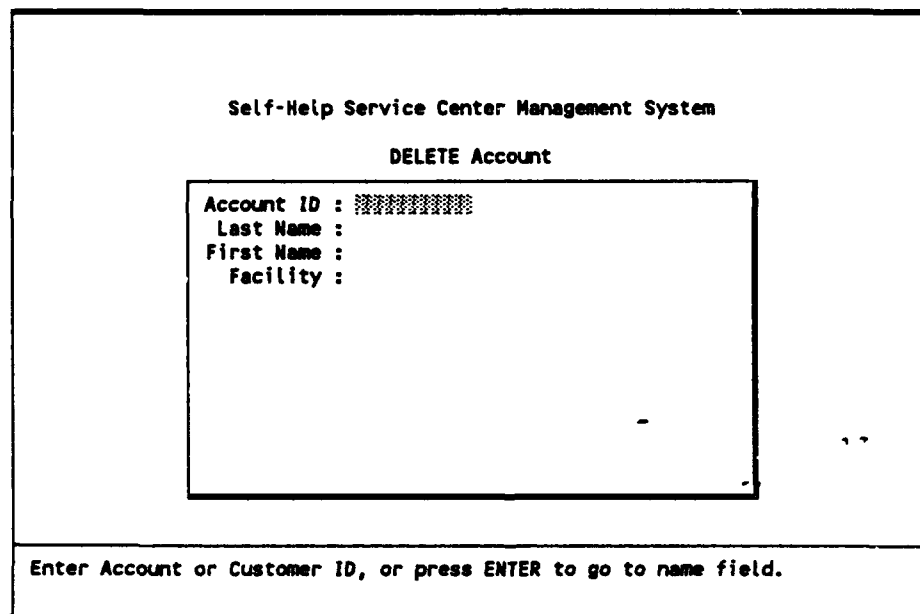
```
┌──────────────────────────EDIT Account──────────────────────────┐
│                                                                 │
│  Account Type(F,B,O) :  F                                       │
│          Account ID :  084423087        FACILITY ID : P48938    │
│       Financial Code :  J                                       │
│                                                                 │
│                                                                 │
│  D   Cust_ID      Last Name      First      M   Rnk  Home Ph.  Work Ph. │
│     ┌──────────┬───────────┬──────────┬───┬─────┬─────────┬──────────┐ │
│     │084423087 │DODGSON    │CHARLES   │ J │     │333-2837 │398-9105  │ │
│     │293484758 │DODGSON    │ALICE     │   │     │333-2837 │-         │ │
│     │          │           │          │   │     │         │          │ │
│     │          │           │          │   │     │         │          │ │
│     │          │           │          │   │     │         │          │ │
│     └──────────┴───────────┴──────────┴───┴─────┴─────────┴──────────┘ │
├─────────────────────────────────────────────────────────────────┤
│  Editing customer.  Enter customer's last name.                 │
│  F10 saves, F2 discards all changes/additions on this screen.   │
└─────────────────────────────────────────────────────────────────┘
```

Figure 9-6. EDIT Customers Assigned to a Selected Account.

4.   All data for customers currently assigned is displayed. Except for the customer ID, all data for such customers may be displayed. To delete a customer currently assigned, locate the cursor in the customer's row and press **Del**. An asterisk(*) will appear in the D (for Delete) column. Press the **Del** key again to undelete the customer.

5.   Add new customers by moving the cursor to the next blank line and typing a customer ID. If the customer already exists, the program fills in the remaining data for that customer. Otherwise, at least the last and first names of the customer must be entered.

6.   When finished, press **F10**. All revisions to the account type, financial code, and facility ID, and additions, changes, and deletions to the customer list will become permanent.

9.3   Delete Accounts

1.   Choose *Delete Accounts* from the ACCOUNTS/CUSTOMERS MENU, and the Delete Account screen appears:

```
              Self-Help Service Center Management System

                            DELETE Account
        ┌─────────────────────────────────────────────┐
        │ Account ID : ▓▓▓▓▓▓▓▓▓▓                      │
        │  Last Name :                                 │
        │ First Name :                                 │
        │   Facility :                                 │
        │                                              │
        │                                              │
        │                                              │
        │                                              │
        │                                  _           │
        │                                        ` ˅    │  :
        │                                              │
        │                                            _ │
        └─────────────────────────────────────────────┘

    Enter Account or Customer ID, or press ENTER to go to name field.
```

Figure 9-7. DELETE Account Screen.

2.   Enter the account ID number or name by following the instructions in Section 3.6.1.

If the account still has outstanding loans, a message to that effect appears. The screen will display the information on that customer and a list of all customers assigned to the account (Figure 9-8).

```
                 Self-Help Service Center Management System)

                           DELETE Account

     Account ID : 084423087

                          Assigned Customers
             CUSTOMER ID  LAST NAME       FIRST NAME
             =================================================

             084423087    DODGSON         CHARLES
             293484758    DODGSON         ALICE




     Confirm Deletion of this account (Y/N):
```

Figure 9-8. Customers Assigned to Account Marked for Deletion.

3.   Press Y to delete account (or N or F2 to abort). If Y, the account is marked as having no customers as of the current date.

9.4   Delete Customers

1.   Choose *Delete Customers* from the ACCOUNTS/CUSTOMERS MENU, and the Delete Customer screen (Figure 9-9) appears.

```
                 Self-Help Service Center Management System  ..

                           DELETE Customer

              Cust ID : ▒▒▒▒▒▒▒▒▒
            Last Name :
            First Name :
             Facility :




     Enter Account or Customer ID or press RETURN to go to name field.
```
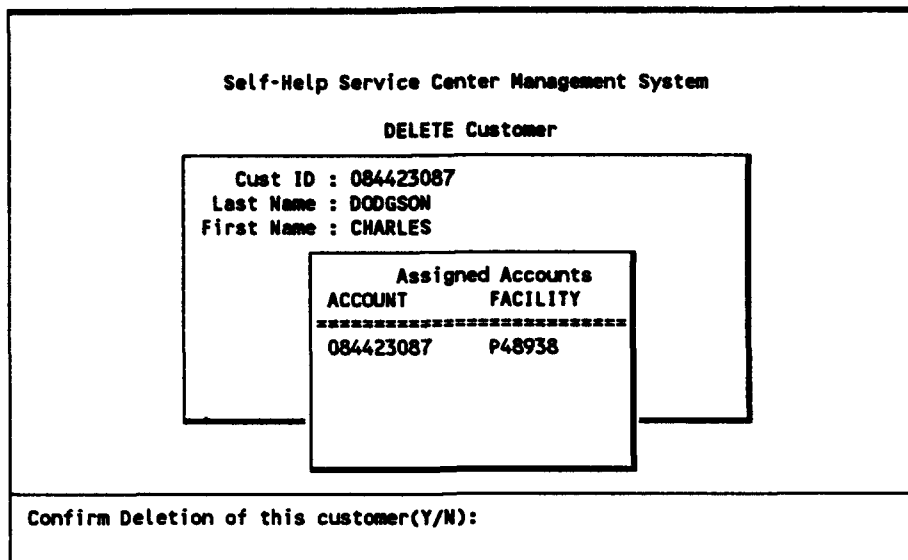
Figure 9-9. DELETE Customer Screen.

2. Enter customer ID number or name by following the instructions in Section 3.6.1.

If the customer still has outstanding loans, a message will appear. The screen will display the customer's information and a list of all accounts to which the customer is assigned (Figure 9-10).

```
+------------------------------------------------------------+
|                                                            |
|           Self-Help Service Center Management System       |
|                                                            |
|                      DELETE Customer                       |
|      +-----------------------------------------+           |
|      |  Cust ID : 084423087                    |           |
|      | Last Name : DODGSON                     |           |
|      | First Name : CHARLES                    |           |
|      |        +-----------------------------+  |           |
|      |        |     Assigned Accounts       |  |           |
|      |        | ACCOUNT        FACILITY     |  |           |
|      |        |=============================|  |           |
|      |        | 084423087      P48938       |  |           |
|      +--------|                             |--+           |
|               |                             |              |
|               +-----------------------------+              |
|                                                            |
+------------------------------------------------------------+
| Confirm Deletion of this customer(Y/N):                    |
+------------------------------------------------------------+
```

Figure 9-10. Account Assigned to Customer Marked for Deletion.

3. Press Y to delete the customer (or N or F2 to abort). The customer is deleted from all of his or her assigned accounts, and the current date becomes the customer's termination date.

9.5 Revise Account ID

Revising an account ID requires searching several of the data files maintained in the program. This operation can take 2 or 3 minutes and will lock out other users from the system during that time. If this choice is selected, the computer will ask for an account ID. Upon identifying an account, the computer displays the customers associated with the account, and asks for the new ID. Upon confirming the new ID, the computer makes the changes.

9.6 Revise Customer ID

Revising a customer ID requires searching several of the data files maintained in the program. This operation can take 2 or 3 minutes and will lock out other users from the system during that time. If this function is selected, the computer asks for a customer ID. Upon identifying a customer, the computer displays the accounts associated with the customer, and asks for the new ID. Upon confirming the new ID, the computer makes the changes.

10 EDIT FACILITY DESCRIPTION

The FACILITY DESCRIPTION MENU allows the operator to edit, add, and delete facility records from the system. Facility descriptions may be used to keep information on facility fixtures, appliances, and furnishings.

Choose *Facility Descriptions* from the MAIN MENU, and then press **Enter**. The following menu (Figure 10-1) appears.

```
+-------------------------------+
| +---------------------------+ |
| | FACILITY DESCRIPTION MENU | |
| +---------------------------+ |
|   Main Menu                   |
|   Edit facilities             |
|   Add facilities              |
|   Delete facilities           |
+-------------------------------+
```
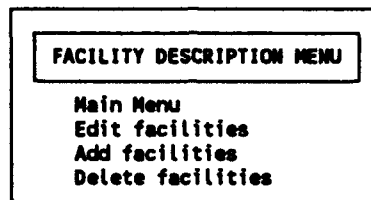
Figure 10-1. FACILITY DESCRIPTION MENU.

10.1 Edit Facilities

1. Choose *Edit Facilities* from the FACILITY DESCRIPTION MENU. The Edit Facility screen appears.

2. Enter the facility number. The screen shows the current information for the facility.

3. Make any changes to the information by typing over that displayed. The screen will appear similar to the Add Facility screen, shown in Section 10.2.

4. Press **F10** to save changes (or **F2** to discard).

10.2 Add Facilities

1. Choose *Add Facilities* from the Facility Menu. The Add Facility screen appears.

2. Enter the facility number. The following screen (Figure 10-2) appears:

```
┌──────────────────────── ADD Facility ────────────────────────┐
│                                                                │
│        Fac #: P43897          Type (F/B/O): _   Category: ____ │
│                                                        '  \  . │
│     ┌──────── Utilities ───────┐  ┌───── Kitchen ─────┐  ┌───── Bath ─────┐
│     Furnace          _____    Range          _____   Lav Faucet  _____ │
│     Air Conditioner  _____    Range Hood     _____   Bath Faucet _____ │
│     Water Heater     _____    Refrigerator   _____   Toilet      _____ │
│     Ventilation Fans _____    Dishwasher     _____   Shower      _____ │
│     Electrical Panel _____    Faucet         _____               _____ │
│     _____  _____    Cabinets       _____   _____   _____ │
│     _____  _____    _____        _____   _____   _____ │
│     _____  _____    _____        _____   _____   _____ │
│                                                                │
│         ┌──────────────── Miscellaneous ────────────────┐     │
│         Wall Finish    _____         │
│         Window Shades  _____         │
│         Window Screens _____         │
│         Floor Cover    _____         │
│         _____       │
│         _____       │
│                                                                │
├────────────────────────────────────────────────────────────────┤
│   Enter:  F-Family   B-Barracks   O-Other                       │
│   F2-Discard Changes    F10-Save Changes    ||-Prev/Next Field   │
└──────────────────────────────────────────────────────────────┘
```

Figure 10-2. ADD Facility Screen.

3. Enter the facility type: Family (F), Barracks (B), or Other (O).

4. Enter the category of the facility. This can be the block where the facility is located or a subdivision name. Its use is only informational, or as a sort field in generating reports. It may be left blank.

5. Fill in the rest of the screen with information on the appliances and materials in the facility. These fields are for descriptive information only and are not searched.

6. Press **F10** to save changes (or **F2** to discard).

Note: Facilities have the Add and Edit options also available from the Issue/Return. Refer to section 4.1.3: List Facility in Chapter 4 - Issue/Return

10.3   Delete Facilities

1. Choose *Delete Facilities* from the FACILITY MENU. The Delete Facility screen appears.

2. Enter the facility number. The facility information will then appear.

3. Press **F10** to delete (or **F2** not to delete).

11 REPORTS

The REPORTS MENU (Figure 11-1) displays the types of reports the system can generate. The following sections cover each selection in the REPORTS MENU. The final section of this chapter discusses software support to generate custom reports.
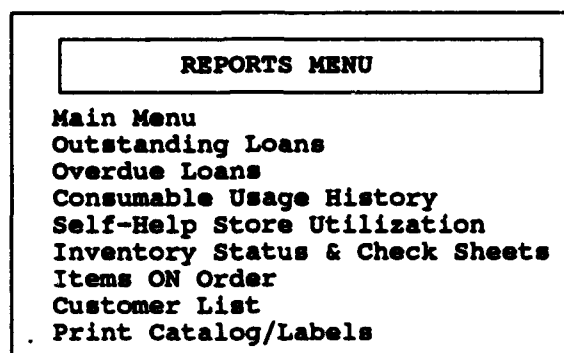
```
┌─────────────────────────────────────────┐
│  ┌───────────────────────────────────┐  │
│  │           REPORTS MENU            │  │
│  └───────────────────────────────────┘  │
│  Main Menu                               │
│  Outstanding Loans                       │
│  Overdue Loans                           │
│  Consumable Usage History                │
│  Self-Help Store Utilization             │
│  Inventory Status & Check Sheets         │
│  Items ON Order                          │
│  Customer List                           │
│. Print Catalog/Labels                    │
└─────────────────────────────────────────┘
```

Figure 11-1. REPORTS MENU.

11.1 Outstanding Loans

The Outstanding Loans report lists nonconsumable inventory items that have been issued to an account. When *Outstanding Loans* is chosen from the REPORTS MENU, the first screen asks for an account or customer ID, which the system uses to identify an account. The second screen displays the account and two or three of the customers assigned to it. A pop-up menu then appears from which the operator chooses whether permanent loans, temporary loans, or both are to be included in the report. Finally, a print menu asks whether to display the report on the screen or to print it. If printing the report, the program returns to the REPORTS MENU when finished. If displaying the report on the screen, pressing Enter when the screen fills up will continue displaying the report. At the end of the report, the program returns to the REPORTS MENU. Pressing the Esc key, while printing to the screen, immediately returns the program to the REPORTS MENU. Outstanding loans for an account can also be displayed from the Issue/Return screen.

11.2 Overdue Loans

The Overdue Loans report lists the inventory items that are past the day (or hour) that the item was due back to the Self-Help Service Center. Overdue loans can be listed by account or inventory item.
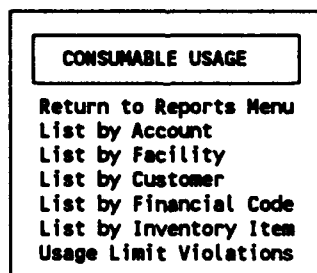
11.2.1 Overdue Loans by Account

If overdue loans are to be listed by account, either indicate a single account (see Section 3.6.1) or enter "ALL" for a list of overdue items for all accounts, sorted by account. (This is useful to generate a list of delinquent customers.) After the report is printed, you can enter another account. Press F2 if no more listings of overdue loans by account are desired, or enter another customer name to continue.

11.2.2 Overdue Loans by Inventory Item

If the overdue loans are to be listed by inventory item, the catalog number or category for the inventory item is entered on the appropriate screen. ALL may be entered to print all overdue loans. If the catalog number is unknown, enter the category and use PgDn to step through the inventory items until the correct item is found. Next, the program asks whether the report is to be displayed on the screen or printed. When the report is finished, the program returns to the Overdue Loans by Inventory Item screen. Press F2 if no more listings of overdue loans by inventory item are desired, or enter another catalog number to continue.

11.3 Consumable Usage History

Consumable Usage History provides several options (Figure 11-2).

```
┌─────────────────────────────┐
│ ┌─────────────────────────┐ │
│ │    CONSUMABLE USAGE     │ │
│ └─────────────────────────┘ │
│ Return to Reports Menu      │
│ List by Account             │
│ List by Facility            │
│ List by Customer            │
│ List by Financial Code      │
│ List by Inventory Item      │
│ Usage Limit Violations      │
└─────────────────────────────┘
```

Figure 11-2. CONSUMABLE USAGE Menu.

11.3.1 Consumable Usage History by Account

After selecting *List by Account*, you may choose from a list of reports (Figure 11-3).

```
┌─────────────────────────────────────────────────┐
│  ┌──────────────────────────────────────────┐   │
│  │   CONSUMABLE USAGE HISTORY BY ACCOUNT     │   │
│  └──────────────────────────────────────────┘   │
│  Return to Previous Menu                         │
│  Account Totals Only                             │
│  Catalog Totals within Account                   │
│  Category Totals within Account                  │
│  Catalog & Category Totals within Account        │
│  Individual Transactions for a Single Account    │
└─────────────────────────────────────────────────┘
```

Figure 11-3. CONSUMABLE USAGE BY ACCOUNT Menu.

After a report has been selected, the system requires you to indicate the scope of the report. Specifically, the system prompts for:

1.   The account ID number (or ALL for all accounts)

2.   Either:
        a.   A catalog number, (or ALL for all catalog numbers)
        b.   An inventory category

3.   A range of dates.

Only choices appropriate for the report selected will be allowed.

Next, pressing **F10** will create the report, and pressing **F2** will abort the function and return to the CONSUMABLE USAGE HISTORY BY ACCOUNT MENU. If the report was created, the program will ask whether the report is to be displayed on the screen or printed. Both printed and displayed reports contain the same information.

11.3.2 Consumable Usage History by Facility

After selecting *List by Facility*, you may choose a list of reports (Figure 11-4).

```
┌─────────────────────────────────────────────────┐
│  ┌──────────────────────────────────────────┐   │
│  │   CONSUMABLE USAGE HISTORY BY FACILITY    │   │
│  └──────────────────────────────────────────┘   │
│  Return to Previous Menu                         │
│  Facility Totals Only                            │
│  Catalog Totals within Facility                  │
│  Category Totals within Facility                 │
│  Catalog & Category Totals within Facility       │
│  Individual Transactions for a Single Facility   │
└─────────────────────────────────────────────────┘
```

Figure 11-4. CONSUMABLE USAGE HISTORY BY FACILITY Menu.

11-3

After a report has been selected, the system requires you to indicate the scope of the report. Specifically, the system prompts for:

1. The facility ID number (or ALL for all facilities)
2. Either:
   a. A catalog number, (or ALL for all catalog numbers)
   b. An inventory category
3. A range of dates.

Only choices appropriate for the report selected will be allowed.

Next, pressing **F10** will create the report, and pressing **F2** will abort the function and return to the CONSUMABLE USAGE HISTORY BY FACILITY MENU. If the report was created, the program will ask whether the report is to be displayed on the screen or printed. Both printed and displayed reports contain the same information.

11.3.3 Consumable Usage History by Customer

After selecting *List by Customer*, you may choose from a list of reports (Figure 11-5).

```
┌─────────────────────────────────────────────────────┐
│  ┌───────────────────────────────────────────────┐  │
│  │     CONSUMABLE USAGE HISTORY BY CUSTOMER       │  │
│  └───────────────────────────────────────────────┘  │
│  Return to Previous Menu                            │
│  Customer Totals Only                               │
│  Catalog Totals within Customer                     │
│  Category Totals within Customer                    │
│  Catalog & Category Totals within Customer          │
│  Individual Transactions for a Single Customer      │
└─────────────────────────────────────────────────────┘
```

Figure 11-5. CONSUMABLE USAGE HISTORY BY CUSTOMER Menu.

After a report has been selected, the system requires you to indicate the scope of the report. Specifically, the system prompts for:

1. The customer ID number (or ALL for all customers)
2. Either:
   a. A catalog number, (or ALL for all catalog numbers)
   b. An inventory category
3. A range of dates.

Only choices appropriate for the report selected will be allowed.

Next, pressing **F10** will create the report, and pressing **F2** will abort the function and return to the CONSUMABLE USAGE HISTORY BY CUSTOMER MENU. If the report was created, the program will ask whether the report is to be displayed on the screen or printed. Both printed and displayed reports contain the same information.

11.3.4 Consumable Usage History by Financial Code

When Usage History by Financial Code has been selected from the CONSUMABLE USAGE HISTORY MENU, the system requests a financial code to be reported (or ALL if all financial codes are to be reported), and a range of dates. Pressing **F10** will create the report, and pressing **F2** will abort the function and return to the CONSUMABLE USAGE MENU. If the report was created, the program will ask whether the report is to be displayed on the screen or printed. Both printed and displayed reports contain the same information.

11.3.5 Consumable Usage History by Inventory Item

If the *List by Inventory Item* choice was selected from the CONSUMABLE USAGE HISTORY MENU, the system requests a single catalog number and a range of months. The report will include a month by month summary of usage and cost. Pressing **F10** will create the report, and pressing **F2** will abort the function and return to the CONSUMABLE USAGE MENU. If the report was created, the program will ask whether the report is to be displayed on the screen or printed. Both printed and displayed reports contain the same information.

11.3.6 Consumable Usage Limit Violations

This report identifies accounts that have exceeded designated consumable item dollar usage in a designated time period. After choosing this report, define these limits (or modify previously set ones) on the **Consumable Usage Limit Violations** screen (Figure 11-6):

```
                    Self-Help Service Center Management System

                         Consumable Usage Limit Violations


                  Range: From Mo/Yr: 02/90
                         Thru Mo/Yr: 11/90

              Default Limits: Family: 3000
                             Barrack: 2000
                              Others: 1000


  Enter range of dates to display consumable usage.
  F2-ABORT!    F10-Save Changes!
```

Figure 11-6. Consumable Usage Limit Violations Screen.

11-5

11.3.7 Procedure in which Consumable Usage History Is Tallied

The program was originally written to accumulate the last cost value for consumable inventory items issued. In version 2.5, program modifications were made to reflect a more accurate history report of consumable line items. The program now stores the current price of the inventory line item in the consumable database. This is done during a transaction of a consumable item. The reports have been modified to accumulate this price, giving a more accurate reflection of the cost of consumable goods at the time they were issued.

11.4   Self-Help Store Utilization

The Self-Help Store Utilization report gives an accurate count of customers per hour for each day of the week. This report would be useful for determining store hours. The Store Utilization report requires that four items of information be entered before the system can gather data. This data must be entered on the first screen after the REPORTS MENU. The program first asks for a start date to start collecting data, and for an end date to stop collecting data. Unless indicated otherwise, the program assumes that the start date is the first month of the current year, and that the end date is the current month and year. To indicate dates other than these, enter the desired dates in the following format:

Start Mo/Yr	01/87
End Mo/Yr	10/87

The start and end times can then be entered. These times are usually the Self-Help Store opening (start) and closing (end) times. If you do not indicate otherwise, the program assumes that the start time is 8:00, and that the end time is 17:00. To indicate times other than these, enter the desired times in the following format:

Start Time	8:00
End Time	17:00

Usually the length of time for counting customers is set to 1 hour, but it can be set to almost any length. The program uses an interval of 1 hour, unless indicated otherwise. To indicate an interval other than this, enter the desired interval in the following format:

Interval	1:00

The last piece of information to enter is the type of housing unit (Family, Barracks, Other, or All), selected from a pop-up menu. The default is All.

After the report is displayed, either print the report by pressing the P key, or return to the REPORTS MENU by pressing **Enter**.

11.5 Inventory Status & Check Sheets

To assist in the physical inventory, the program will print inventory check sheets. The report sorts the inventory items by aisle, row, and bin. The check sheet lists the catalog number, description, aisle, row, bin, and a blank space to record the physical count.
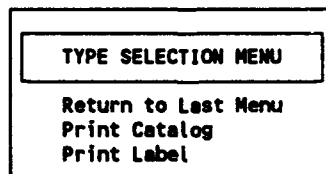
11.6 Items ON Order

The Items ON Order report lists the inventory items that have been put on order. When this report is selected from the REPORTS MENU, the program asks whether the report is to be printed or displayed on the screen. Both displayed and printed reports contain the same information. The inventory items on order are listed by supplier.

11.7 Customer List

This lists customers in the database. When the menu appears, choose whether the list is to be sorted by customer ID, account ID, last name, or facility. A small pop-up screen then prompts for the starting and ending range of the sort field; if sorting by facility or account prompts whether to include only one or all alternate customers; and whether to include customers from Family, Barracks, Other, or All accounts. The program then creates the list of customers. Finally, the program asks whether the list is to be printed or displayed on the screen. If a screen display is chosen, the PgUp and PgDn keys can be used to browse through the list.

11.8 Print Catalog/Labels

The program can print a whole or partial inventory catalog on 8-1/2-in. by 11-in. paper, or adhesive labels to mark bins and/or items. Both the catalog and labels include barcodes. Selecting the Print Catalog/Labels from the Reports Menu displays the Catalog/Label Menu (Figure 11-7). Use this menu to choose between an inventory catalog or barcode labels.

```
┌─────────────────────────────┐
│ ┌─────────────────────────┐ │
│ │   TYPE SELECTION MENU    │ │
│ └─────────────────────────┘ │
│   Return to Last Menu        │
│   Print Catalog              │
│   Print Label                │
│                              │
└─────────────────────────────┘
```

Figure 11-7. Catalog/Label Menu.

11.8.1 Print Catalog

After choosing Print Catalog (Figure 11-8), you must designate the portions of the catalog to print. Typing ALL for the starting category prints the whole catalog (i.e., all categories). If ALL or a range of categories is designated, each category printed will start on a new sheet; items within a category are printed in catalog number order. If the categories are left blank, a range of catalog numbers can be printed.

Finally you may select the printer type from the Printer Selection Menu (Figure 11-9).

```
┌─────────────────────────────────────────────────────────────┐
│                                                             │
│                                                             │
│           Self-Help Service Center Management System        │
│                                                             │
│              .                                              │
│              .                                              │
│                                                             │
│                                                             │
│        ┌────────────────────────────────────────────────┐  │
│        │              RANGE SELECTION                    │  │
│        └────────────────────────────────────────────────┘  │
│     Category Number  Start:                                 │
│                        End:                                 │
│                                                             │
│        Catalog Number  Start:                               │
│                          End:                               │
│                                                             │
│                                                             │
│                                                             │
│                                                             │
│─────────────────────────────────────────────────────────── │
│ CATEGORY # or ALL or press ENTER to go to CATALOG field.    │
│  F2-Reports Menu                                            │
└─────────────────────────────────────────────────────────────┘
```

Figure 11-8. Print Catalog Screen.

```
┌─────────────────────────────────┐
│  ┌───────────────────────────┐  │
│  │  PRINTER SELECTION MENU    │  │
│  └───────────────────────────┘  │
│      Return to Last Menu        │
│      Laser Jet Printer          │
│      Dot Matrix Printer         │
└─────────────────────────────────┘
```

Figure 11-9. PRINTER SELECTION MENU.

11.8.2 Print Labels

After selecting Print Label, you must enter catalog numbers and the number of labels to print in the Barcode Labels Selection screen (Figure 11-10). The computer will complete the description field. The right arrow key can tab over beyond the visible area at the right side of the screen to reveal an item's additional description fields. After confirmation, entering a category number in the Catalog # column places all items from that category into the table.

```
                Self-Help Service Center Management System

                        Barcode Labels Selection

    ┌──────────────────────────────────────────────────────────┐
    │  Catalog #      # Labels Description                      │
    ├──────────────────────────────────────────────────────────┤
    │  00000035      │ 1    │ LAWN MOWER                         │
    │       .        │      │                                    │
    │                │      │                                    │
    │                │      │                                    │
    └──────────────────────────────────────────────────────────┘


    Enter Number of Labels to print for this Catalog #.
    ↕ scrolls; F4 Add a line; DEL delete a line; F2 Quit; F10-Done
```

Figure 11-10. Barcode Labels Selection Screen.

After pressing F10, select the port to print the barcode labels. (A separate printer may be devoted to printing labels.) The previously selected printer port is always displayed as the default. The Printer Port Selection Menu (Figure 11-11) appears, and the program requests confirmation that the printer is ready before printing the labels.

```
    ┌────────────────────────────────┐
    │ ┌────────────────────────────┐ │
    │ │ PRINTER PORT SELECTION MENU │ │
    │ └────────────────────────────┘ │
    │        Return to Last Menu     │
    │        LPT 1                    │
    │        LPT 2                    │
    │        LPT 3                    │
    │        COM 1                    │
    │        COM 2                    │
    │                                │
    └────────────────────────────────┘
```

Figure 11-11. PRINTER PORT SELECTION MENU.

11-9

11.9 Minimum Balance Report

The minimum balance report is designed to aid the Self-Help store in tracking items that have fallen below a certain balance. This aids in re-order and inventory control.

After selecting the minimum balance report from the report menu, enter the minimum amount to base the report on. Select which mode to write the report--printer or screen. Next, select from the next pop-up--consumable items, non-consumable items or all item types. Highlight the one which fits the needs of the particular site. After making the desired selection, the final pop-up box will appear. From this pop-up, select catalog, category or National Stock Number to establish the sort order. Once this selection is made, the report will print all items which are less than or equal to the incorporated amount and within the above established parameters.
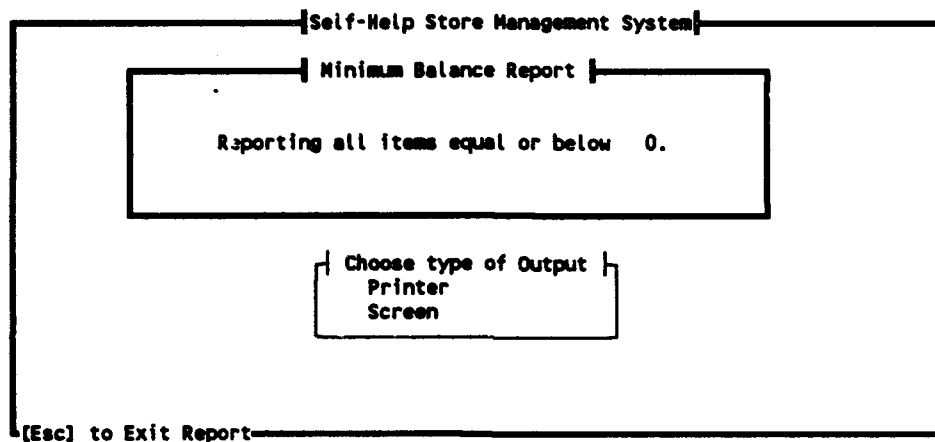

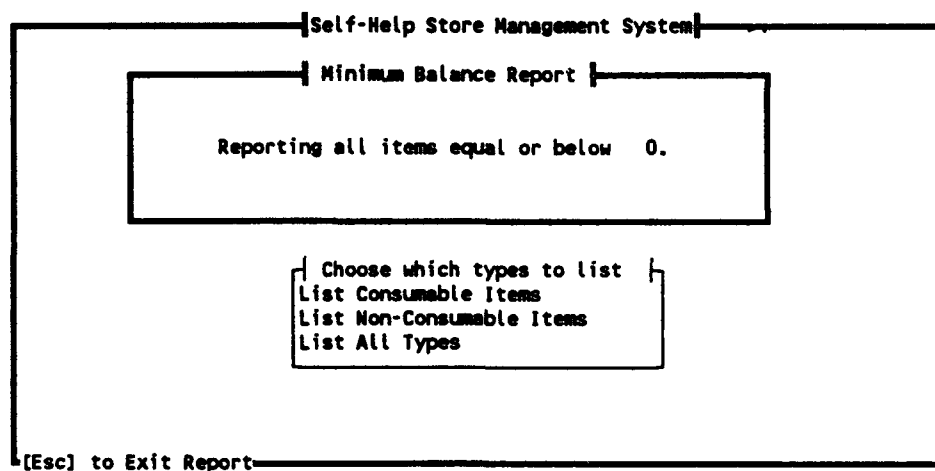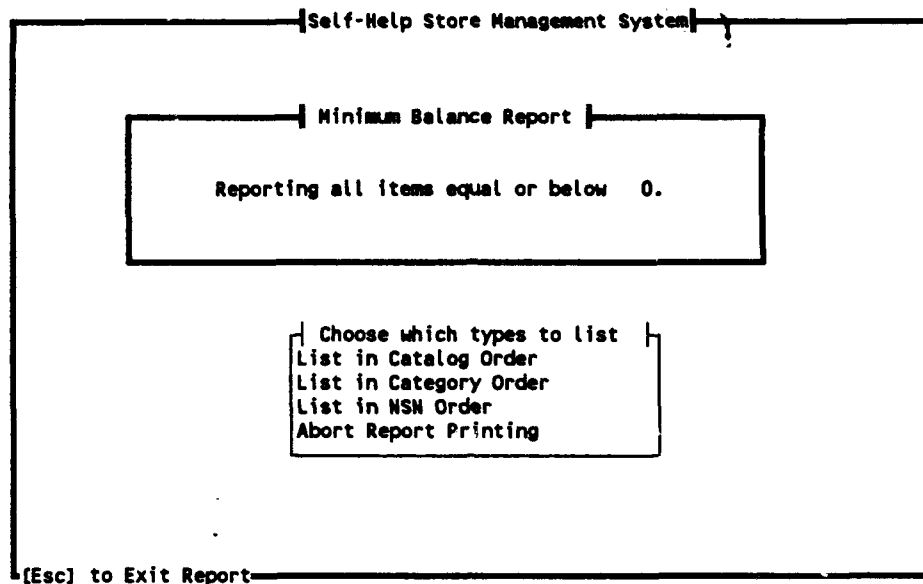**Figure 11-12. Showing Prompt and Pick Menu for Minimum Balance Report.**

Figure 11-13. Item Type List for Minimum Balance Report.

11-10

```
┌─────────────────────────┤Self-Help Store Management System├─┐
│                                                             │
│                                                             │
│         ┌─────────────┤ Minimum Balance Report ├──────────┐ │
│         │                                                 │ │
│         │    Reporting all items equal or below   0.      │ │
│         │                                                 │ │
│         │                                                 │ │
│         └─────────────────────────────────────────────────┘ │
│                                                             │
│                                                             │
│                    ┌┤ Choose which types to list ├┐         │
│                    │List in Catalog Order         │         │
│                    │List in Category Order        │         │
│                    │List in NSN Order             │         │
│                    │Abort Report Printing         │         │
│                    └──────────────────────────────┘         │
│                                                             │
│                                                             │
│                                                             │
│▲[Esc] to Exit Report────────────────────────────────────────┘
```

Figure 11-14. Order List for Minimum Balance Report.


```
Date: 04/04/94              Minimum Balance Report
                              Items with 0 or less
                            Reporting Consumable Items

                                                      Inventory
Category    Catalog          Description    Type Unit  Balance
─────────────────────────────────────────────────────────────

FURNISH   15               BUNK BEDS          C   EA      0
          24               DFASDF             C   DF      0
```

Figure 11-15. Sample Display of Minimum Balance Report.
(for consumable items with a zero balance)

11.10 Inventory on Hand Report

This selection will give listing of current inventory items and their amounts. The listing is in catalog number order. Output can be directed to either the screen or the printer. Figure 11-16 shows an example of the inventory on hand report if output was selected to go to the screen.

```
┌─────────────────────────────────────────────────────────────────┐
│              Self-Help Service Center Management System           │
│                  Authorized Stockage List        '  )            │
│                                                      !            │
│                                                                   │
│                                                                   │
│                                                                   │
│ Catalog#     Stock#          Description              UI  QTY C Avail│
│ ----------------------------------------------------------------- │
│ 101A         5640-01-T00-0858 COMPOUND, JOINT, READY-MIX, GL  10 C  35│
│                               WALLBOARD, LOC:  BUVAA               │
│ |                                                                  │
│ 101A         5640-01-TU0-0858 COMPOUND, JOINT, READY-MIX, GL  10 C  35│
│                               WALLBOARD, LOC:  BUVAA               │
│ |                                                                  │
│ 102A         5620-01-T00-0844 GLASS, DOUBLE STRENGTH,     SH  20 C   9│
│                               16" X 50"                            │
│ |                                                                  │
│ 102A         5680-00-477-6071 COVE BASE, BLACK, 4" X 48"  EA  48 C  90│
│                               RUBBER, LOC:  AUCBA                   8│
│                                                                   │
│               RETURN-to Continue   ESC-to QUIT                     │
└─────────────────────────────────────────────────────────────────┘
```

Figure 11-16. Sample Display of Inventory on Hand Report.

11.11 Custom Reports

Most reporting needs should be satisfied by the capabilities described in this chapter.

Those who need additional reports from the system, and who understand dBase, may wish to use either R&R Relational Report Writer, or dQUERY.[1] If obtaining R&R, be sure to get the module required for use with CLIPPER files. dQUERY is well adapted to quickly designing reports of simple to moderate complexity. R&R easily produces complicated reports that might otherwise be difficult to produce. If using either of these products, note that the SHSC Management System program uses CLIPPER index files, which have the extension .ntx, rather than dBASE index files, which have the extension .ndx. Refer to R&R or dQUERY documentation for their use with .ntx files.

Appendix A describes the database (.dbf) structures and index file (.ntx) keys for those developing their own reports.

---

[1] Both programs are available commercially.

12   PASSWORD FUNCTIONS

The password functions allow adding, editing, and deleting passwords, and choosing functions accessible to each password. These functions can be used when new operators are allowed onto the system, when there are changes in operator information or function access, or when operator passwords are removed from the system.

The assignment of passwords provides security for the system's use, but is not essential to using it. Most locations will probably not wish to implement passwords. If you do choose to use the password capability, it is good to be aware of three warnings:

1.   The first password created must be the master password, which has access to all functions.

2.   Do not create a password that has access to no functions.

3.   Creating only one password without access to any functions, or forgetting passwords, may result in loss of the ability to access one or more functions from the MAIN MENU.

In case a single password without access to any functions has been entered, or if passwords have been forgotten, the master password "SEPT1986" allows access to all functions.

Choose the *Password Functions* selection from the MAIN MENU, and the PASSWORD MENU (Figure 12-1) will appear:

```
┌─────────────────────┐
│  PASSWORD MENU      │
├─────────────────────┤
│ Main Menu           │
│ Edit Passwords      │
│ Add Passwords       │
│ Delete Passwords    │
│ List Passwords      │
│                     │
└─────────────────────┘
```

Figure 12-1. PASSWORD MENU.

12.1   Edit Passwords

The *Edit Passwords* function allows changing the information associated with a certain password. To change any information about an operator, or to edit the functions to which an operator has access:

1.   Choose *Edit Passwords* from the MAIN MENU, and then press **Enter**.

2.   The *Edit Passwords* screen will then appear and prompt for the password to be entered. At this point, either return to the PASSWORD MENU by pressing **F2** (and no changes will be effective), or enter the password and press **Enter**.

12-1

3. Change the operator's name and/or job by choosing the field and typing over the present entry.

4. To continue, press **F10**.

A screen (Figure 12-2), similar to the MAIN MENU, appears.

```
┌─────────────────────────────────────┐
│              MAIN MENU              │
├─────────────────────────────────────┤
│ Issue/Return                        │
│ Equipment Repair                    │
│ Reorder/Receive Inventory           │
│ Suppliers                           │
│ Inventory & Store Hours             │
│ Accounts/Customers                  │
│ Facility Descriptions               │
│ Reports                             │
│ Password Functions                  │
└─────────────────────────────────────┘
```

Figure 12-2. Menu of Functions Allowed Access by a Password.

To allow or disallow access to any function, simply choose that function by using the **up and down arrow** keys, and press **Enter**. The function can be changed by pressing **Enter** again. Those functions for which access is allowed are flagged by arrows, as in the example above, where the *Issue/Return* and *Equipment Repair* functions have been designated accessible.

F10 saves the accessible functions and redisplays the *Edit Password* screen. Remember that if you press **F2** at this point, any changes made to the password information are not saved. You may then edit another password, or press **F2** to return to the PASSWORD MENU. Then select another password function, or return to the MAIN MENU.

12.2 Add Passwords

The *Add Passwords* function allows assigning passwords to operators and determining to which functions they have access:

1. Choose *Add Passwords* from the PASSWORD MENU, and press **Enter**. A screen appears with spaces to fill in a password, a person's name, and a person's job.

2. Enter a new password, and then press **Enter**. (The program will not accept a password that has already been assigned.)

3. Enter the name and job of the operator to whom this new password is being assigned, and press **F10**. The screen shown in Figure 12-3, resembling the MAIN MENU, will appear.

```
┌──────────────────────────────────────┐
│            MAIN MENU                  │
├──────────────────────────────────────┤
│  Issue/Return                         │
│  Equipment Repair                     │
│  Reorder/Receive Inventory            │
│  Suppliers                            │
│  Inventory                            │
│  Accounts/Customers                   │
│  Facility Descriptions                │
│  Reports                              │
│  Password Functions                   │
└──────────────────────────────────────┘
```

Figure 12-3. Menu of Functions Allowed Access by an Operator.

Choose those functions to which this operator is to have access. To do this, select the function by using the up and down arrows, and press **Enter**. Those functions selected for the operator's access will be flagged by double arrows.

For example, the Menu above shows that the operator is allowed to access only the *Issue/Return* and *Equipment Repair* functions. Should this operator attempt to access any other functions, he or she would not be allowed access.

Press **F10** to save the selections made and return to the Add Passwords screen. Then either add another password, or press **F2** to return to the PASSWORD MENU without saving the newly entered password.

12.3 Delete Passwords

The *Delete Passwords* function allows the removal of a password from the system. This is done when an operator no longer needs the password, or changes it. If the password has changed, add the new password and delete the old.

1. Choose *Delete Passwords* from the PASSWORD MENU, and then press **Enter**.

2. Enter the password that is to be deleted, and then press **Enter**. The password entered must be one currently assigned.

3. Press **F10** to delete the password (or **F2** to abort).

12.4   List Passwords

The *List Passwords* function displays a list of all of the passwords and operators.

1.   Choose *List Passwords* from the PASSWORD MENU, and then press **Enter**.

2.   Move to the next page of the password list by pressing **Enter**, or return to the PASSWORD MENU by pressing **Esc**.

13   QUIT SYSTEM TO DOS

This MAIN MENU function causes the program to end, and returns the operator to DOS. Always end the system by selecting this last option. This ensures that all data files will be updated and closed properly.

To quit to DOS, either:

1.   Choose *Quit System to DOS* from the MAIN MENU, and then press Enter.

2.   Press Q.

14   THE CONSUMABLE PURGE UTILITY

The Self-Help program stores information from transactions in order to perform time analysis reports based on customer issues. This information is stored in two databases (consumab.dbf and fac_cons.dbf). As transactions accumulate, the consumable databases will grow in size. This will cause problems with disk space and the speed in which reports can be generated.

It is good practice to print a hard copy of the desired reports for a given time frame. For example, one may generate reports based on all pertinent consumable history topics for one year. Once the hard copy has been completed, it is possible to create an archive of the consumable databases for backup and historical purposes. The data is no longer important to the system once the desired reports have been generated. The consumable databases could then be purged of all irrelevant data with the purge program.

To use the purge program to delete consumable records no longer important to Self-Help, go to the DOS prompt (e.g., C:\Selfhelp). From the directory where Self-Help resides, type PURGE.

C:\SELFHELP > PURGE

The purge program will start at the main menu. From this menu, selections to purge consumable data, fac_cons data, cust_log data and reindex all consumable data are available. To complete the desired operation, move the highlight bar with the up and down arrow keys and press enter. The highlighted letter of each menu option can be pressed for a hot-key.

14.1 Purge Consumable Data (Fac_cons.dbf & Consumab.dbf)

The selection on the main menu to remove consumable data pertains to the removal of unwanted records in the consumable database only.   The fac_cons database will not be affected by the purging of consumable data in the consumab.dbf database. The fac_cons.dbf database is designed to hold records for a lookup history during transaction process of customer or facility ID. It is not used in the reporting of consumable history within reports. It is suggested to not purge the fac_cons database as often as the consumable database. The program features the same methods of data removal for the fac_cons database. Select fac_cons from the main menu to purge fac_cons.

A menu appears which will allow the selection of a method to purge consumable data. Data can be purged by Date, Account, or Facility ID. To purge consumable data by date, highlight the "Remove Data by Date" selection and press [Enter]. The screen will show a prompt to allow entry of the earliest date to keep in the system. If it is desired to keep data from 1 June 93 on, then 1 June 93 should be entered in this prompt. A calendar is shown to aid in the date selection. It offers both a way to view the days in front and in back of a desired date range and allows the quick entry of a date to the prompt field. To choose a date from the calendar, use the arrow keys to move between dates. The date will blink to indicate the currently selected date. Press [Enter]

on the selected date and the date will show in the prompt box. The default date used with the start of the calendar is one year prior to the system date. To enter a date without the aid of the calendar, press [Esc]. The prompt box will appear and the cursor will be ready for a date entry. Once the desired date has been selected, the program will remove all records created before the selected date. Once the procedure is complete, the operator is shown the count of records deleted. After removal of any consumable data, the databases should be reindexed. To reindex the consumable databases, select the Reindex Consumable Data option from the main menu.

To remove consumable data by account or facility, select the desired option from the consumable database menu. The program prompts for entry of an account or facility number, depending on which selection was chosen. Partial entry will bring up a search list. The search list will seek the desired account or facility based on which letter or number has been pressed during the account or facility selection process. Once the desired number has been reached in the pick list, the option to tag an account or facility is available. To tag a particular selection, press the space bar. Pressing the space bar on a tagged selection will untag the selection. F8 will tag all account or facilities. F9 will untag all previously tagged selections. The tagging feature is intended to aid the operator in tagging multiple accounts or facility numbers. To purge only one account or facility, press [Enter] while in the pick list to select that facility. Once all desired selections have been tagged, pressing enter will continue the purging process. All tagged or selected accounts/facilities will be purged from the consumable database. Once any records are removed from the consumables database, all consumable data should be reindexed.

14.2 Removal of Data from the Cust_log Database

The purging utility also allows the purging of the customer log database (cust_log). Like the consumable databases, this database will grow with each customer transaction. This data is used to report the Self-Help store utilization. As with the consumable data, the old data is no longer necessary once a hard copy of a report has been printed. The longer the database is used without a purge, the more disk space is used and much greater is the time it takes to sort data for a report. It is suggested that the purge utility be run to delete records no longer needed for the generation of reports.

To purge data from the cust_log database, select "Purge Cust_log Data" from the main menu. The screen will show a prompt box with a calendar below it. The calendar can be manipulated with the arrow keys and with PgUp and PgDn. The PgUp and PgDn keys will scroll through months forward or backward. The arrow keys will move to a specific date. The selected date will blink. Pressing [Enter] on the selected date will place the date in the prompt field. The default start date for the calendar is one year prior to the current system date. This date will represent the earliest date that is desired to keep in the cust_log database. To exit the calendar, press [Esc]. This is done when it is wished to enter a date in the prompt box without the aid of the calendar. Once a date is selected, the program will purge all data from the cust_log database that is earlier than the selected date. It will report back how many records have been removed. Once data has been removed from the cust_log database, "Reindex" should be selected from the main menu.

14-2

15 THE ADDPASS.EXE UTILITY (Password Creation)

The addpass utility allows the creation of a **SUPERVISOR** password. This is used when a password has been forgotten and there is no access to menu options. The Self-Help install program copies addpass.exe to the Self-Help directory. It is advised that this program be copied to a floppy disk and tested to be sure the copy works properly. The floppy should then be stored in a secure location and accessed by administrative personnel. The addpass.exe program residing in the Self-Help directory should then be deleted.

Typing "addpass" at the DOS> prompt will load the program into memory. The screen shows a prompt which allows the entry of the directory in which Self-Help is stored. The default is C:\Selfhelp, but can be changed to show the directory which exists on the particular site's system. After the correct directory has been typed in the prompt, press [Enter]. The program will search for a password named SUPERVISOR. If it does not find one, it will create the password and show a message saying that the password has been created. This password will give access to all menu items. If the program finds a password named SUPERVISOR already current in the system, it will bring up a menu which allows the selections to add another supervisor, modify the existing one (in case that one may have lost access rights to menus), or abort the program. If "Add Supervisor" is selected, it will create another SUPERVISOR password and leave the existing one in place. If "Modify Existing Supervisor" is chosen, the existing password will be given access to all menu items. Aborting the program will return to DOS in all cases.

16 BARRING CUSTOMERS FROM ISSUES

Because of non-standard issues regarding the administration of each Self-Help store, it is difficult to bar customers for a given reason and fit the needs of every store. Some stores feel the need to have some administrative action taken for customers who do not comply with store policies. Since each store has a different view on which policies need action and the severity of the action, the program has been modified to allow administrative action taken upon a customer which does not conform to that particular store's obligations. The program allows the store to create their own set of codes which will lock a customer from the ability to check out items.

16.1 Setting up Lockout Codes

```
┌──────────────────────────────────────────────────┐
│              Self-Help System Settings             │
├──────────────────────────────────────────────────┤
│                                                    │
│     Default Issue Limit for Family Housing:  3000  │
│                                                    │
│     Default Issue Limit for Barracks:        3000  │
│                                                    │
│     Default Issue Limit for Other:           3000  │
│                                                    │
│     Default Issue Start:                     07/92 │
│                                                    │
│     Default Issue End:                       11/92 │
│                                                    │
│     Customer Days from Start until Expired:    0   │
│                                                    │
│                                                    │
│                                                    │
│ [Esc] Abort──────────────────────F5 Lockout Codes │
└──────────────────────────────────────────────────┘
```

Figure 16-1. Sample Display of System Settings Screen

From the main menu, select "System Settings". The system setting screen allows for system defaults to be entered and maintained. Pressing F5 from this screen implements the lockout code setup. A box appears showing all lockout codes. The operator can add, delete, or modify lockout codes from this section. To add a lockout code, press F5. The box shows a prompt which has a sequential number in the Lock Number field. This number can be changed to any number, or [Enter] can be pressed to select the default. The default lock number represents the next available number. The Lock Description field will hold the reason to lock out a customer. For example, the store may want to lock out any customers with overdue temporary loans of more than 5 days.

16-1

"Overdue Loans" could be typed in this field to describe the reason of lockout. The following is a list of some possible reasons to lock a customer from receiving items.

- Overdue Loans
- Consumable Limit Exceeded
- Permanent Issue Limit Exceeded
- Temporary Limit Exceeded
- No Valid Training Card
- Customer Has Expired
- Customer Caused Damage to Temporary Items

There could be other reasons added to this list. In fact, the lockout section is completely optional. Once the fields have been filled in, the program will confirm that all information is correct and ask if other codes will be entered. Two keys to remember when adding lockout codes: The numbers can be changed to any number preferred; this is the number which will be assigned to a locked out customer. Also, the description typed in the field will be the same description which shows when an operator attempts to issue an item to a locked out customer.

```
┌─────────────────────────────────────────────────────────────┐
│                   Self-Help System Settings                  │
├─────────────────────────────────────────────────────────────┤
│                                                              │
│         Default Issue Limit for Family Housing: 3000         │
│     ┌──────────────┤ Define Lockouts ├─────────────────┐     │
│     │                                                   │     │
│     │   ┌─────────┤ Existing Lockout Codes ├────────┐   │     │
│     │   │ 0    No Lockout                         █  │   │     │
│     │   │ 1    Overdue Loans                         │   │     │
│     │   │ 2    Consumable Limit Exceeded             │   │     │
│     │   │ 3    Permanent Issue Limit Exceeded -      │   │     │
│     │   │ 4    This is a test                        │   │     │
│     │   └───────────────────────────────────────────┘   │     │
│     │                                                   │     │
│     └F4 Delete─────────────────────────────F5 Add┘     │
│                                                              │
│  [Esc] Abort──────────────────────────────F5 Lockout Codes   │
└─────────────────────────────────────────────────────────────┘
```

Figure 16-2. Sample Display of Initial Lockout Screen. (From here it is possible to add, delete, or edit lockout codes as needed by the system. This provides the ability to customize the lockout procedure for a particular Self-Help Service Center.)

16-2

```
┌──────────────────────────────────────────────────────────┐
│                    Self-Help System Settings      .        │
├──────────────────────────────────────────────────────────┤
│                                                            │
│        Default Issue Limit for Family Housing: 3000        │
│        ┌─────────────────┤ Define Lockouts ├───────────┐   │
│        │   Lock Number          Lock Description      │   │
│        │        7                                     │   │
│        │                                              │   │
│        │                                              │   │
│        │                                              │   │
│        │                                              │   │
│        └─────────────Adding Lock Code─────────────────┘   │
│                                                            │
└──────────────────────────────────────────────────────────┘
 └[Esc] Abort─────────────────────────────F5 Lockout Codes─┘
```

Figure 16-3. Sample Display of Lockout Screen in ADD Mode.

16.2 Editing Existing Lock Codes

To edit a lock code, press [Enter] over the highlighted code desired. The box will show the two
fields pertaining to the lockout code. These fields can be edited as desired and saved. Once the
fields have been edited, a prompt will ask if all information is correct. If "Y" is pressed, the
program will save the information and return to the pick list. Duplicate numbers for lockout
codes are not allowed.

16.3 Deleting Lockout Codes

To delete a lockout code, select the desired code to delete with the highlight bar and press F4.
The program will ask for confirmation to delete this code and if "Y" is pressed will delete the
desired code. The exception is that a 0 (zero) can not be deleted. This is the value of a standard
customer who is not locked out.

17 LOCKING OUT A CUSTOMER

Once the lockout codes have been established, customers can be barred from checkouts by placing a lock out code in their account record. To do this, select "Account/Customers" from the main menu and select "Edit accounts" from the "Accounts/Customers" menu. Enter the desired account to edit. Once the account is listed on the screen, press F10 to edit customers. When the customer list comes up, a prompt at the bottom of the screen will appear which reads "F5 Lockout Codes". Pressing F5 will bring up a box which shows the customer's current lock code status and another box which is a picklist to select and choose which lockout code to place in the customer account. Press [Enter] over the highlighted picklist item to activate the lockout code for that customer. [Esc] will return to the customer edit mode and will save the new information to the customer account. At this point, the customer will be barred.

Once a customer is locked out, the program will prompt the operator that an attempt is made to enter the "Issue/Return" section of the program with that customer. The prompt will show the operator why the customer is locked out with the description created while creating lockout codes. The prompt will ask the operator if they wish to continue. If the operator selects "Y"es, the transaction can continue in the normal fashion. If the operator answers "N"o to the prompt, the program will return to the issue menu.

The lockout is designed to flag operators that there is a problem with this account. The action taken is then strictly up to each individual store's policy. To reset a locked out customer, select the No Lockout item from the lockout pick list once the customer's account is in edit mode.

All customers that are not locked out have a lockout code of 0 (zero) in the lock_code field of the customer database.

```
==============================EDIT Account===============================
  Account Type(F,B,O):  F
           Account ID:  11                  FACILITY ID: 335           , .        :
       Financial Code:  BOO        Consumable Item Limit: $3000
       Street Address:                                       . .

 D   Cust_ID      Last Name        First    M   Rnk   Home Ph.    Work Ph.
                          ---| Customer Lock Code |---------------------
      11                                                            -6868
          Cust ID          Lock Code        Lock Description
          11               2                Consumable Limit Exceeded


                    ---| Existing Lockout Codes |---
                    0    No Lockout
                    1    Overdue Loans
                    2    Consumable Limit Exceeded
                    3    Permanent Issue Limit Exceeded
                    4    This is a test

 Press Enter to Select.    [Esc] to Save and Exit
```

Figure 17-1. Sample Display of Edit Account Screen Locking Out a Customer.

```
 Close Transaction      List Overdues     List Outstanding      List Facility
┌────────────────────────────────────────────────────────────────────────────┐
│  Customer ID: 11            Account ID: 11        Today's Date:  03/30/94    │
│   Last Name: GRACE                                Consumable Usage($)        │
│  First Name: MARK           Unit Type: Family              Limit: 3000       │
│  Facility ID: 335           Address:                     Current:    0       │
│                                                                              │
│                                                                              │
│                                                                              │
│                                                                              │
│                                                                              │
│                                                                              │
│                                                                              │
│                                                                              │
│         ┌────────────────────────────────────────────────────────┐         │
│         │ Customer has been Locked Out.  Reason: Consumable Limit Exceeded │ │
│         │           Do you wish to continue? Y/N                  │         │
│         └────────────────────────────────────────────────────────┘         │
└────────────────────────────────────────────────────────────────────────────┘

 F2-Issue/Return Menu                    Current-Issue/Return Mode
```

Figure 17-2. Sample Display of Issue Return Mode When Customer Locked Out. (This occurs when the operator attempts to complete a transaction after a customer has been locked out.)

18 CUSTOMER EXPIRATION DATES

Customer expiration dates can be maintained through the "Edit Accounts/Customers" menu selection. A default time frame of active accounts can be established through the "System Settings" screen. An edit field labeled "Customer Days from Start until Expired" exists for setting the default. If a zero is placed in this edit field, the customer expiration dates are disabled. To enable the expiration date, place a value in this field. The value reflects the default days from customer start date until expiration date.

If the customer expiration date is left blank, the program will use the default value to establish the date. The start date, if left blank, will be the system date by default. All defaults can be overridden by placing the desired date in the start date or ending date field.

If the customer expiration date is enabled, Self-Help will check the expiration date as a customer enters the Issue/Return screen. If the expiration date has been reached, the operator will be prompted and asked if they wish to continue. If it is desired to continue, the program will allow the issue to occur.

The expiration date feature is designed to let the operator know that the customer has expired and that some administrative action should be taken.

```
━━━━━━━━━━━━━━━━━━━━━━━━━━━━━EDIT Account━━━━━━

  Account Type(F,B,O):  F
           Account ID:  11                    FACILITY ID:  335
       Financial Code:  BOO        Consumable Item Limit:  $3000
       Street Address:

      First      M   Rnk   Home Ph.   Work Ph.   START      END
    ────────────────────────────────────────────────────────────
      MARK                    -          -       11/15/93   11/15/94




Editing customer.  Enter Customer's date end.
F10 saves, F2 discards all changes/additions on this screen.  F5 Lockout Codes
```

Figure 18-1. Screen Showing Customer Ending Date Field
(Leave blank for default or override the default by placing a value in the ending date

APPENDIX A
Data File Structures

This information is provided for those who wish to (1) derive additional reports from the Self-Help Service Center Management System, (2) upload customer and/or account information, or (3) load inventory information. **CAUTION: Any attempt to adjust data in Self-Help databases may result in corruption of the system. Please be certain that you thoroughly understand the effect of any changes you may make on the databases in the system.**

- All index files have extension .NTX
- All data files have .DBF extension

FILE:　　　ACCOUNT.DBF

DETAIL:　　Describes each account. Related to CUSTOMER.DBF by AUTHORIZ.DBF (See description of AUTHORIZ.DBF)

Field	Length	Type	Picture	Description
ACCT_ID	10	C		Account ID
ACCT_TYPE	1	C		Account type F,T,O
FAC_ID	10	C		Facility associated with the account
FINAN_CODE	8	C		Financial code for the account
NOCUST	8	D		Date all customers removed from account – Reset to blank if customers restored to account.
ADDRESS	20	C		Account address

TOTAL LENGTH　　*57*

INDEX FILES	INDEX EXPRESSION
ACCT_ID.NTX	ACCT_ID
ACCT_FAC.NTX	FAC_ID
ACCT_FIN.NTX	FINAN_CODE

FILE: AUTHORIZ.DBF

DETAIL: Indicates which customers in which accounts.

Field	Length	Type	Picture	Description
CUST_ID	10	C		Customer ID
ACCT_ID	10	C		Account ID
FACILITY	10	C		Facility ID (duplicated from ACCOUNT.DBF)

TOTAL LENGTH   *30*

INDEX FILES	INDEX EXPRESSION
AU_ACCT.NTX	ACCT_ID
AU_CUS.NTX	CUST_ID
AU_FAC.NTX	FACILITY

FILE: CON_SET.DBF

DETAIL: One record data file with consumable issue limits

Field	Length	Type	Picture	Description
S_DATE	5	C		Display Parameter
E_DATE	5	C		Display Parameter
FAMILY	4	N		Consumable Usage Limit
BARRAK	4	N		Consumable Usage Limit
OTHERS	4	N		Consumable Usage Limit
DAYS2EXP	3	N		Default value for customer expiration days

TOTAL LENGTH   *25*

NO INDEX FILES

FILE: CONS_RPT .DBF

DETAIL: Template file for consumable reports

Field	Length	Type	Picture	Description
ID	10	C		ID of customer to whom item issued
UNIT_NO	10	C		Facility
DATE	8	D		Date of issue
SH_CAT_NO	15	C		Catalog number of issued item
QUANTITY	4	N	9999	Quantity issued
ACCT_ID	10	C		Account to which issued
TIME	5	C		Time of issue
FINAN	8	C		Financial Code
U_COST	9	N		Unit cost
SUB_COST	10	N		Subtotal
T_COST	11	N		Total Cost
CATEGORY	8	C		Category
PRICE	6.2	N		Price of Inventory Item

TOTAL LENGTH   *114*

NO INDEX FILES

FILE: CONSUMAB .DBF

DETAIL: History of consumable usage.

Field	Length	Type	Picture	Description
ID	10	C		ID of customer to whom item issued
UNIT_NO	10	C		Facility
DATE	8	D		Date of issue
SH_CAT_NO	15	C		Catalog number of issued item
QUANTITY	4	N	9999	Quantity issued
ACCT_ID	10	C		Account to which issued
TIME	5	C		Time of issue
CATEGORY	8	C		Category
PRICE	6.2	N	9999.99	Current price of inventory item

TOTAL LENGTH   *76*

FILE: CONSUMAB .DBF (continued)

INDEX FILES	INDEX EXPRESSION
CONS_ID.NTX	ID
CONS_SHC.NTX	SH_CAT_NO
CONS_DAT.NTX	DATE
CONS_ACC.NTX	ACCT_ID

FILE: CUSTOMER .DBF
DETAIL: Customers in system. Related to accounts by AUTHORIZ.DBF.

Field	Length	Type	Picture	Description
ID_1	10	C		Customer ID
LAST_1	15	C		Last name
FIRST_1	8	C		First name
MID_1	1	C		Middle initial
RANK_1	3	C		Rank
DATE_START	8	D		Date entered into system
DATE_END	8	D		Not used.
WORK_PHONE	8	C		Work phone number
HOME_PHONE	8	C		Home phone number
OLD_ID	10	C		Not currently used.
NOACCT	8	D		Date unassigned from all accounts. (If customer later reassigned to an account, this field replaced with blanks.)
LOCK_CODE	3	N		Lock Code (Zero if normal account)

TOTAL LENGTH   *90*

INDEX FILES	INDEX EXPRESSION
CUS_ID1.NTX	ID_1
CUS_NAME.NTX	LAST_1+FIRST_1

FILE: CUST_LOG .DBF

DETAIL: Record entered into this file every time a customer visits Self-Help Service Center. This .dbf used to report on Self-Help Service Center usage.

Field	Length	Type	Picture	Description
ID	10	C		Customer ID
DATE	8	D		Date of visit
TIME	5	C		Time of visit
DOW	1	N	9	Day of week (1=Sunday,...,7=Saturday)
HOUS_TYPE	1	C		F, T, or O

TOTAL LENGTH 25

INDEX FILES	INDEX EXPRESSION
LOG_DATE.NTX	DATE
LOG_ID.NTX	ID

FILE: CUST_LST .DBF

DETAIL: Used as template for a temporary file created while printing a customer list report.

Field	Length	Type	Picture	Description
ID_1	10	C		Customer Identification
LAST_1	15	C		Customer Last Name
FIRST_1	8	C		Customer First Name
UNIT_NO	10	C		Customer Unit Number
ALTFLAG	1	C		Is Customer in Other Accounts
ACCT_ID	10	C		Customer's Account Identification

TOTAL LENGTH 54

NO INDEX FILES

FILE: FAC_CONS.DBF

DETAIL: History of consumable usage. Used to generate on-screen reports of Facility and Account Usage history.

Field	Length	Type	Picture	Description
ID	10	C		ID of customer to whom item issued
UNIT_NO	10	C		Facility
DATE	8	D		Date of issue
SH_CAT_NO	15	C		Catalog number of issued item
QUANTITY	4	N	9999	Quantity issued
ACCT_ID	10	C		Account to which issued
TIME	5	C		Time of issue
CATEGORY	8	C		Category
FAC_ID	10	C		Facility ID of Customer

TOTAL LENGTH   *80*

INDEX FILES	INDEX EXPRESSION
FACNTX.NTX	FAC_ID
CUSNTX	ID

FILE: FACILITY .DBF

DETAIL: Facility descriptions.

Field	Length	Type	Picture	Description
FAC_ID	10	C		Facility ID
UNIT_TYPE	1	C		F, T, or O
CATEGORY	8	C		Category of Housing
FURNACE	8	C		Furnace Description
WATR_HEATR	8	C		Water Heater Description
AIR_COND	8	C		Air Conditioner Description
RANGE	8	C		Range Description
RANGE_HOOD	8	C		Range Hood Description
DISHWASHER	8	C		Dishwasher Description
FRIGERATOR	8	C		Refrigerator Description
KIT_FAUCET	8	C		Kitchen Faucet Description
KIT_CABNET	8	C		Kitchen Cabinet Description

A-6

FILE: FACILITY .DBF (continued)

DETAIL: Facility descriptions.

Field	Length	Type	Picture	Description
LAV_FAUCET	8	C		Lavatory Faucet Description
BAT_FAUCET	8	C		Bathroom Faucet Description
WATR_CLOST	8	C		Water Closet Description
SHOWER	8	C		Shower Faucet Description
WALLFINISH	8	C		Wall Finishing Description
VENT_FANS	8	C		Vent Fans Description
WIN_SHADES	40	C		Window Shade Description
WIN_SCREEN	40	C		Window Screen Description
FLR_COVER	40	C		Floor Covering Description
COMMENT_1	25	C		Additional Comments
COMMENT_2	25	C		Additional Comments
COMMENT_3	25	C		Additional Comments
COMMENT_4	21	C		Additional Comments
COMMENT_5	21	C		Additional Comments
COMMENT_6	20	C		Additional Comments
COMMENT_7	20	C		Additional Comments
COMMENT_8	20	C		Additional Comments
COMMENT_9	20	C		Additional Comments
COMMENT_10	55	C		Additional Comments
COMMENT_11	55	C		Additional Comments
COMMENT_12	55	C		Additional Comments

TOTAL LENGTH   *629*

INDEX FILES	INDEX EXPRESSION
FAC_ID.NTX	FAC_ID

FILE: HOLIDAY.DBF

DETAIL: Days of special hours for Self-Help store.

Field	Length	Type	Picture	Description
H_DATE	8	D		Date for special hours
OOB	5	C		Opening time for this date
COB	5	C		Closing time for this date
H_DESCR	20	C		Holiday description

TOTAL LENGTH   *38*

INDEX FILES	INDEX EXPRESSION
HOLIDAY.NTX	H_DATE

FILE: IND_RETN.DBF

DETAIL: Template for temporary dbf use during Return Only mode of Issue/Return.

Field	Length	Type	Picture	Description
SH_CAT_NO	15	C		Catalog number of issued item
ITEM_TYPE	1	C		Consumable or Nonconsumable
ISSUE_RET	1	C		
QTY	4	N	9999	Qty issued
SERIAL	15	C		Serial number if serialed item
DUE_DATE	8	D		Due Date for Temporary Items
DUE_TIME	5	C		Due Time for Temporary Items
IS_SERIAL	1	C		Y(N) if (not) serial
DLT	1	C		Has Item been Deleted?
DESCRIPT	30	C		Item Description
CUST_ID	10	C		Customer Identification
OUT_QTY	4	N	99	Quantity returned

TOTAL LENGTH   *95*

NO INDEX FILES

FILE: IND_TRAN .DBF

DETAIL: Template file for temporary database that holds customer transaction list, before the list is closed.

Field	Length	Type	Picture	Description
SH_CAT_NO	15	C		Catalog Identification of Inventory Item
ITEM_TYPE	1	C		Temporary, Permanent, Consumable
ISSUE_RET	1	C		
QTY	4	N	9999	Quantity to be Issued
SERIAL	15	C		Serial Number of Item
DUE_DATE	8	D		Due Date of Temporary Item
DUE_TIME	5	C		Due Time of Temporary Item
IS_SERIAL	1	C		Is the item Serial?
DLT	1	C		Is the item deleted?
DESCRIPT	30	C		Item Description
CUST_ID	10	C		Customer Identification

TOTAL LENGTH   *91*

NO INDEX FILES

FILE: INVNTORY .DBF

DETAIL: Contains information about the stores entire inventory, both consumable and non-consumable.

Field	Length	Type	Picture	Description
SH_CAT_NO	15	C		Catalog number
IS_SERIAL	1	C		If nonconsumable, does item have serial numbers? (Y or N)
ITEM_TYPE	1	C		C for Consumable, N for Nonconsumable
DESC	30	C		First line of description
DESC_2	60	C		Second line of description
DESC_3	60	C		Third line of description
LOC_AISLE	2	C		Aisle
LOC_ROW	2	C		Row
LOC_BIN	2	C		Bin
AUTHORIZ	3	C		One or more characters from set {FTO}, indicating which accounts authorized for item

FILE: INVNTORY .DBF (continued)

Field	Length	Type	Picture	Description
SOURCE_NO	4	C		Supplier number for this item
LST_PRICE	9	N	999999.99	Last price for the item
MON_START	8	C		MM/DD/YY when usage monitoring of item starts
MON_END	8	C		MM/DD/YY when usage monitoring of item ends
MON_LIMIT	5	N	99999	Limit for any account during monitoring period
DX	1	C		Y or N, indicating if Direct Exchange
DSTART_1	5	C		MM/DD starting 1st reorder exception period
DEND_1	5	C		MM/DD ending 1st reorder exception period
ORDR_LEV_1	5	N	99999	Inventory level triggering reorder, 1st reorder exception period
ORDR_QTY_1	5	N	99999	Reorder quantity, 1st reorder exception period
DSTART_2	5	C		MM/DD starting 2nd reorder exception period
DEND_2	5	C		MM/DD ending 2nd reorder exception period
ORDR_LEV_2	5	N	99999	Inventory level triggering reorder, 2nd reorder exception period
ORDR_QTY_2	5	N	99999	Reorder quantity, 2nd reorder exception period
LEVEL	5	N	99999	Inventory level triggering reorder, normal period
QTY	5	N	99999	Reorder quantity, normal period
AVAILABLE	5	N	99999	Number in stock
ON_LOAN	5	N	99999	Number on loan (applicable to nonconsumables only)
INOPERATIV	5	N	99999	Number in for repairs (applicable to nonconsumables only)
ON_ORDER	5	N	99999	Number on order
DEF_DAYS	2	N	99	Default days of loan (applies to nonconsumables only)
DEF_HRS	2	N	99	Defaults hours of loan (applies to nonconsumables only)
STOCK_NO	16	C		National stock number (field available for any descriptive info)
CATEGORY	8	C		Category
UI	2	C		Unit of issue (not used in any program analys:

TOTAL LENGTH   313

INDEX FILES	INDEX EXPRESSION
INV_NO.NTX	SH_CAT_NO
CATEGORY.NTX	CATEGORY
NSN.NTX	STOCK_NO

FILE: LO_CODES.DBF

DETAIL: Used to map lock out codes for barring customers.

Field	Length	Type	Picture	Description
LO_NUM	3	N		Code Number for Lock out code
DESC	30	C		Description of Lock out

TOTAL LENGTH   *33*

INDEX FILES	INDEX EXPRESSION
LO_NUM.NTX	LO_NUM

FILE: PASSWD .DBF

DETAIL: Contains user passwords and capabilities.

Field	Length	Type	Picture	Description
PWD	10	C		Password
NAME	30	C		Name of password owner
CAPACITY	30	C		Job (or any other desired) description of password owner
PWD1	1	L		PWDx indicates if owner allowed access to xth MAIN MENU function
PWD2	1	L		
PWD3	1	L		
PWD4	1	L		
PWD5	1	L		
PWD6	1	L		
PWD7	1	L		
PWD8	1	L		
PWD9	1	L		

TOTAL LENGTH   *79*

NO INDEX FILES

FILE: PERMANEN.DBF

DETAIL: Records current permanent issues. When the item is returned the record is overwritten with blanks for later reuse. The next issue is put into the blank record, if such exists.

Field	Length	Type	Picture	Description
ID	10	C		ID of customer receiving item
UNIT_NO	10	C		Facility number of account receiving item
DATE_ISS	8	D		Date of issue
SH_CAT_NO	15	C		Catalog number of item
QUANTITY	4	N	9999	Quantity
SERIAL	15	C		Serial number of item (if item is serial)
TIME_ISS	5	C		Time of issue
ACCT_ID	10	C		ID of account receiving item

TOTAL LENGTH   *77*

INDEX FILES	INDEX EXPRESSION
PERM_ID.NTX	ID
PERM_ACC.NTX	ACCT_ID
PERM_SHC.NTX	SH_CAT_NO

FILE: REPAIR .DBF

DETAIL: Tracks nonconsumable items in for repair.

Field	Length	Type	Picture	Description
SH_CAT_NO	15	C		Catalog number of item
SERIAL	15	C		Serial number (if nonserial, some repair rder number)
DATE_SENT	8	D		Date sent for repairs
DATE_RET	8	D		Date returned from repairs
LABOR	7	N	9999.99	Labor cost
PARTS	7	N	9999.99	Parts cost

TOTAL LENGTH   60

INDEX FILES	INDEX EXPRESSION
REP_SHC.NTX	SH_CAT_NO
REP_SER.NTX	SERIAL

FILE: SERIALS .DBF

DETAIL: File of individual items having serial numbers.

Field	Length	Type	Picture	Description
SH_CAT_NO	15	C		Catalog number
SERIAL	15	C		Serial number
STATUS	1	C		A (Available), P (Permanent loan), T (Temporary loan), R (Repair)
RECV_DATE	8	D		Date item placed in service
DEL_DATE	8	D		Date item removed from service
USAGE	4	N	9999	Number of times item used

TOTAL LENGTH   *51*

INDEX FILES	INDEX EXPRESSION
SHC_SER.NTX	SH_CAT_NO+SERIAL

FILE: SER_TMP .DBF

DETAIL: Template for temporary file used to update serial numbered items.

Field	Length	Type	Picture	Description
SH_CAT_NO	15	C		Item's Catalog Identification
SERIAL	15	C		Serial Number of Item
STATUS	1	C		Available, Not Available
DELNEW	1	C		Delete this Item?
CUST_ID	10	C		Customer Identification
ACCT_ID	10	C		Account Identification
FACILITY	10	C		Facility Identification
DATE_ISS	8	D		Date of Issue
TIME_ISS	5	C		Time of Issue
DATE_DUE	8	D		Date Due
TIME_DUE	5	C		Time Due
USAGE	4	N	9999	How many times has this item been issued?
RECV_DATE	8	D		Date item was received
DEL_DATE	8	D		Date item was taken out of system

TOTAL LENGTH   *108*

NO INDEX FILES

FILE: SER_LOCK.DBF

DETAIL: File to hold serial numbered item while in transaction. This will disallow the same item to be issued elsewhere on a network.

Field	Length	Type	Picture	Description
SH_CAT_NO	15	C		Catalog number of item
SERIAL	15	C		Serial number of item
TOTAL LENGTH	*30*			

NO INDEX FILES

FILE: SUPPLIER .DBF

DETAIL: Contains supplier names, address, and phone numbers.

Field	Length	Type	Picture	Description
NAME	30	C		Name
ADDRESS_1	30	C		Up to four lines of address
ADDRESS_2	30	C		
ADDRESS_3	30	C		
CONTACT	30	C		
PHONE	12	C		Phone
ID	4	C		ID code for supplier
TOTAL LENGTH	*166*			

INDEX FILES	INDEX EXPRESSION
SUP_ID	ID

FILE: TEMPORAR .DBF

DETAIL: Records current temporary loans. When the item is returned the record is overwritten with blanks for later reuse. The next issue is put into the blank record, if such exists.

Field	Length	Type	Picture	Description
ID	10	C		ID of customer receiving item
UNIT_NO	10	C		Facility number of account receiving number
DATE_ISS	8	D		Date issued
DATE_DUE	8	D		Date due
TIME_DUE	5	C		Time due
SH_CAT_NO	15	C		Catalog number of item
QUANTITY	4	N	9999	Quantity owned
SERIAL	15	C		Serial number of item
TIME_ISS	5	C		Time when issued
ACCT_ID	10	C		Account to which issued

TOTAL LENGTH   *90*

INDEX FILES	INDEX EXPRESSION
TEMP_ID.NTX	ID
TEMP_ACC.NTX	ACCT_ID
TEMP_SHC.NTX	SH_CAT_NO

FILE: TEMP_CUS.DBF

DETAIL: Template for temporary file used while assigning and deleting customers from accounts

Field	Length	Type	Picture	Description
ID_1	10	C		Customer Identification
OLD_ID	10	C		Old Customer Identification
LAST_1	15	C		Customer Last Name
CST_1	8	C		Customer First Name
MID_1	1	C		Customer Middle Initial
RANK_1	3	C		Customer Rank
UNIT_NO	10	C		Customer Unit Number
DATE_START	8	D		Customer Start Date
DATE_END	8	D		Customer End Date
WORK_PHONE	8	C		Customer Work Phone

FILE: TEMP_CUS.DBF (continued)

Field	Length	Type	Picture	Description
HOME_PHONE	8	C		Customer Home Phone
ACCOUNT	10	C		Customer Account Identification
DLT	1	C		
ADD_CUS	1	L		Is Customer in another Account?
REC	4	N	9999	Physical Record Number Position

TOTAL LENGTH   *105*

INDEX FILES	INDEX EXPRESSION
T_CUS_ID.NTX	ID_1

FILE: TFPX .DBF

DETAIL: This file contains a single record with a single field. TFPXNO contains a single alphabetic character that is augmented after you sign on to system. '}' with the augmented character becomes the prefix for temporary files created during a session with the program.

Field	Length	Type	Picture	Description
FPXNO	2	C		File Prefix

TOTAL LENGTH   *2*

NO INDEX FILES

FILE: W_DATES.DBF

DETAIL: Regular store hours for each day of week.

Field	Length	Type	Picture	Description
DAYWEEK	1	N	9	1 = Sun,...,7 = Sat
OOB	5	C		Opening time
COB	5	C		Closing time
D_DESCR	3	C		Abbreviation for day of week

TOTAL LENGTH   *14*

INDEX FILES	INDEX EXPRESSION
WEEK.NTX	DAYWEEK